Phase 9: Reporting, Dashboards & Security Review

CONNECT Student Success Platform - Salesforce CRM Implementation

9.1 Reports

Use Case: Reports in Salesforce help users and admins view, track, and analyze data stored in custom and standard objects. They support smart decision-making by summarizing key information (such as student interventions, feedback, or progress) in clear tables and visualizations. Different report formats (Tabular, Summary, Matrix, Joined) offer flexible ways to organize and understand data for operational, strategic, and compliance needs.

Implementation Steps:

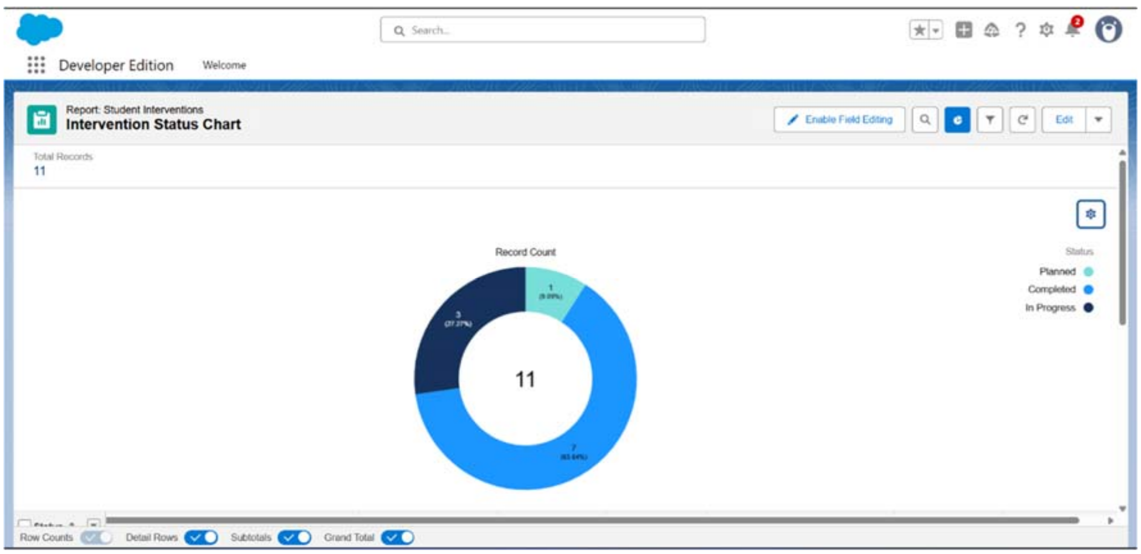
1. **Navigate to Reports Tab**
   - Click the **App Launcher (grid icon)** at the top left.
   - Search and select **Reports**.
2. **Create Tabular Report**
   - Click **New Report**.
   - Type and select **Student Interventions** as the report type.
   - Click **Continue**.
   - Ensure no groupings; remove any if present.
   - Drag relevant fields (e.g., Name, Intervention Date, Status, Student) into the columns area.
   - Click **Save** and name the report (e.g., "Student Interventions - Tabular").
   - Click **Run** to display results.
3. **Create Summary Report**
   - Start as above with a New Report for Student Interventions.
   - In the builder, drag a group field (e.g., Status) to the "Group Rows" section.
   - Add columns as needed.
   - Add summary calculations if available.
   - Save and Run the report as above.
4. **Add Pie Chart to Report**
   - Open a Summary report.
   - Click **Add Chart** (top right, looks like a bar graph).
   - Select **Pie Chart** in the chart panel.

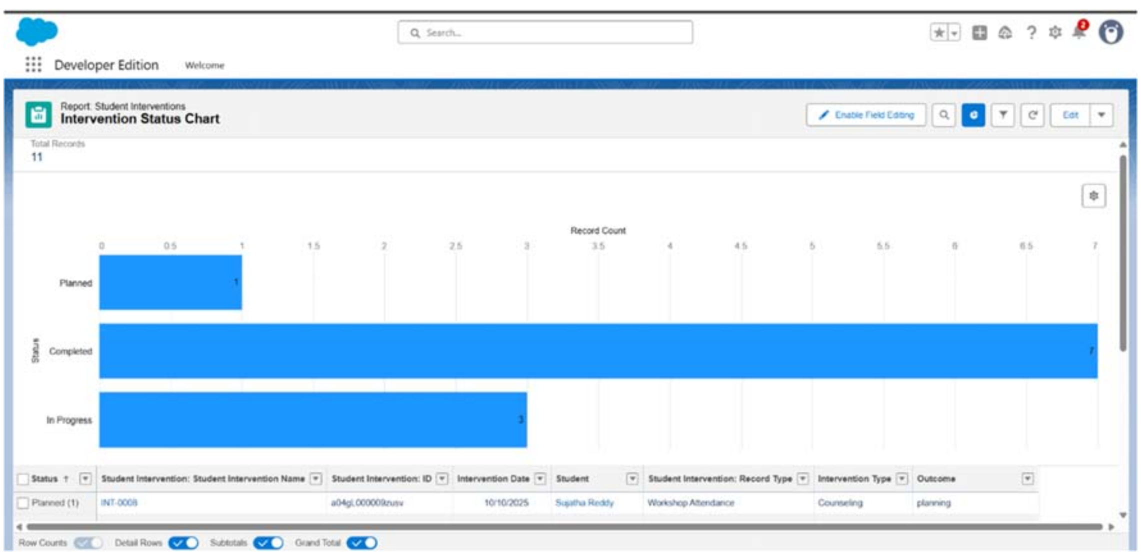
- Customize chart title, labels, or percentages as needed.
- Save the report.

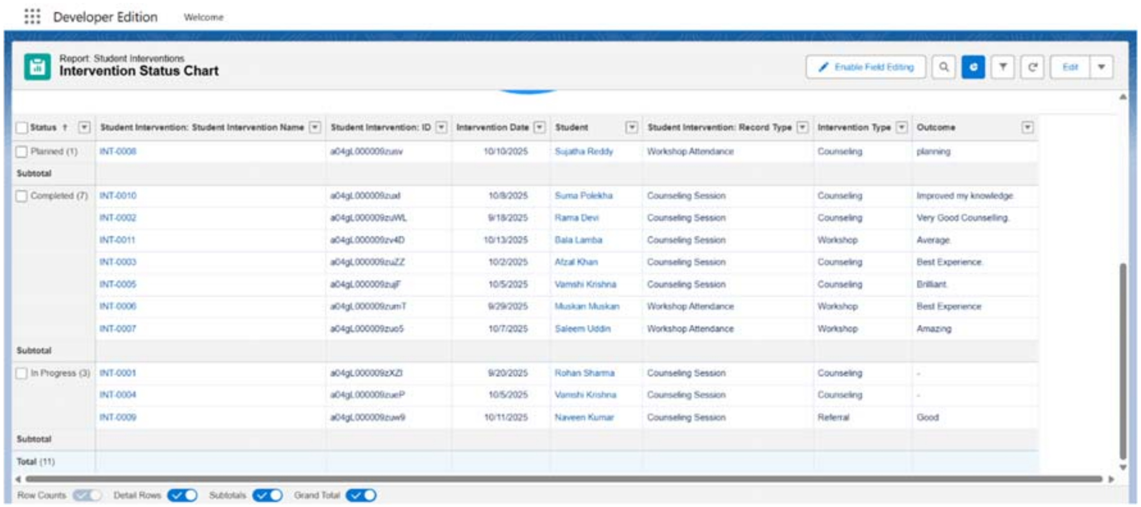
5. *(Matrix and Joined Reports can be created following similar steps by adding row and column groups, or multiple report blocks, respectively.)*

Result and Benefits:

- You now have tabular and summary reports that display your Student Interventions data in clear tables and grouped summaries.
- Adding a Pie Chart gives a quick visual overview of distribution, such as how many interventions are completed versus in progress.
- Reports help spot trends and gaps in student support and make your database instantly useful for managers and staff.







Status ↑	Student Intervention: Student Intervention Name	Student Intervention: ID	Intervention Date	Student	Student Intervention: Record Type	Intervention Type	Outcome
Planned (1)	INT-0008	a04gL000009zusv	10/10/2025	Sujatha Reddy	Workshop Attendance	Counseling	planning
Subtotal							
Completed (7)	INT-0010	a04gL000009zuat	10/8/2025	Suma Polekha	Counseling Session	Counseling	Improved my knowledge.
	INT-0002	a04gL000009zuWL	9/18/2025	Rama Devi	Counseling Session	Counseling	Very Good Counselling.
	INT-0011	a04gL000009zv4D	10/13/2025	Bala Lamba	Counseling Session	Workshop	Average.
	INT-0003	a04gL000009zuZZ	10/2/2025	Afzal Khan	Counseling Session	Counseling	Best Experience.
	INT-0005	a04gL000009zujF	10/5/2025	Vamshi Krishna	Counseling Session	Counseling	Brilliant.
	INT-0006	a04gL000009zumT	9/29/2025	Muskan Muskan	Workshop Attendance	Workshop	Best Experience
	INT-0007	a04gL000009zuo5	10/7/2025	Saleem Uddin	Workshop Attendance	Workshop	Amazing
Subtotal							
In Progress (3)	INT-0001	a04gL000009zXZI	9/20/2025	Rohan Sharma	Counseling Session	Counseling	-
	INT-0004	a04gL000009zueP	10/5/2025	Vamshi Krishna	Counseling Session	Counseling	-
	INT-0009	a04gL000009zuw9	10/11/2025	Naveen Kumar	Counseling Session	Referral	Good
Subtotal							
Total (11)							

9.2 Report Types

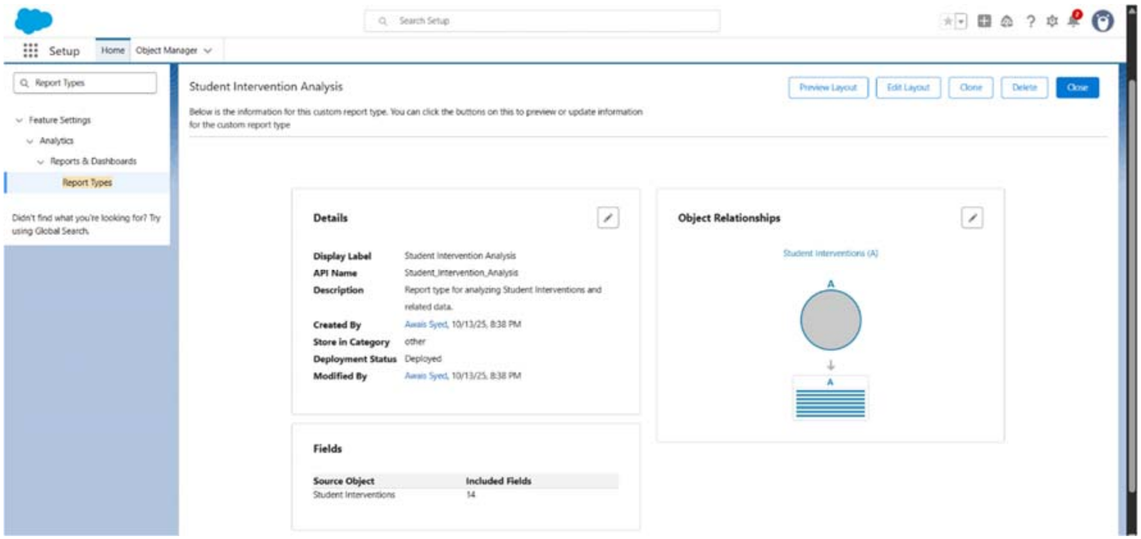
Use Case: Custom Report Types in Salesforce let users create new ways to view and report on data, combining information from one main object (like Student Interventions) and its related objects (like Activities). This is useful when off-the-shelf report types don't show exactly what is needed for tracking school progress, performance, or relationships between objects.

Implementation Steps:

1. **Go to Setup**
   → Click the gear icon (Setup) in the top right.
2. **Find Report Types**
   → In the left sidebar, type and select "Report Types".
3. **Create New Custom Report Type**
   → Click **New Custom Report Type** at top right.
   → Select the **Primary Object** (for example, Student Interventions).
   → Fill in Display Label, API Name, Description, and Category.
   → Set Status to "Deployed".
4. **Add Related Objects (Optional)**
   → Click "Click to relate another object".
   → Choose a related object (e.g., Activities).
   → Select the relationship type (Inner/Outer Join).
   → Add more if needed.
5. **Save the Report Type**
   → Click "Save".
6. **View/Edit the New Report Type**
   → Review the Report Type's details page.

Result and Benefits:

- A custom report type lets the organization create advanced reports tailored for specific needs, combining objects and fields not available in standard report types.
- This supports more flexible reporting, deeper insights, and improved data-driven decisions for teachers, admins, or managers.



9.3 Dashboards

Use Case: Dashboards in Salesforce are used to visually track and monitor key metrics, trends, and detailed data from multiple reports in a single view. The "Student Progress Dashboard" helps users (like teachers or admins) quickly see how student interventions are progressing, what types are most common, and any students needing the most support, all in one place.

Implementation Steps:

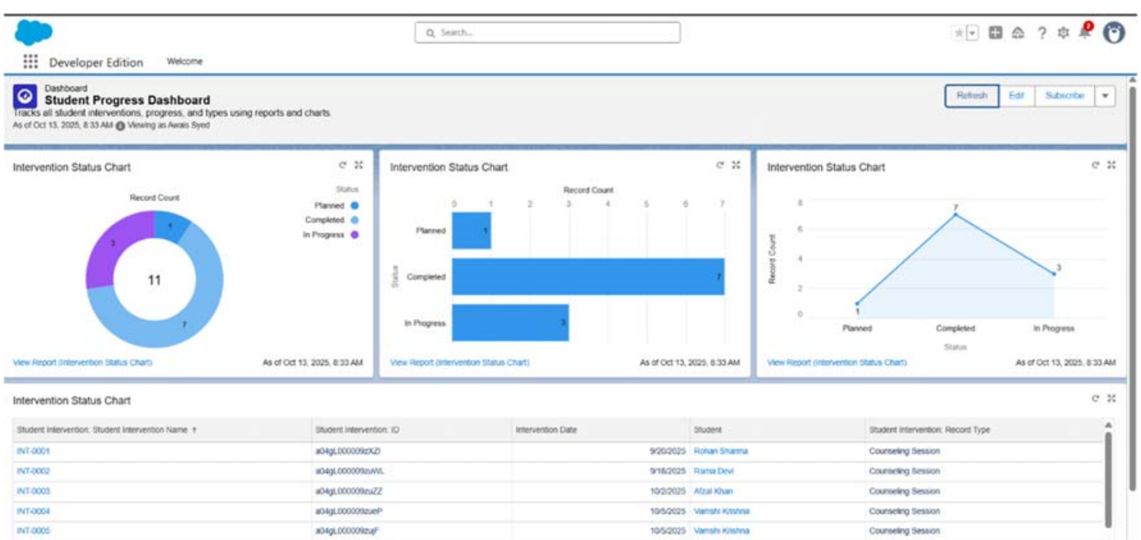
1. **Go to Dashboards**
    - Click the App Launcher (grid icon) → search and select **Dashboards**.
2. **Create New Dashboard**
    - Click **New Dashboard** button
    - Enter the Dashboard Name: "Student Progress Dashboard", add a Description (e.g., "Tracks all student interventions, progress, and types using reports and charts.")
    - Choose a folder (e.g., "Private Dashboards" for practice; select a public folder to share)
    - Choose "Me" for "View Dashboard As" if only viewing yourself, or "The dashboard viewer" to personalize for each user.
    - Click **Save**.
3. **Add Components**

- Click + **Widget** (or + **Component**)
- Select your source report, such as a Student Interventions report:
    - Add a **Donut/Pie Chart** for intervention status distribution (planned, in progress, completed)
    - Add a **Bar Chart** for count of completed interventions
    - Add a **Line Chart** for progress trends over time
    - Add a **Table** to list detailed intervention data for each student
- Adjust filters, groupings, and titles as needed
- Click **Add**
- Arrange and resize components
- Click **Save**, then **Done** to finish.

4. **View and Share**
    - Review your dashboard.

Result and Benefits:

- All important student intervention data is now visual and interactive in a single dashboard, making it easy to understand progress, spot trends, and identify students or interventions needing more attention.
- Dashboards update automatically as reports update, so data stays fresh without manual effort.
- The dashboard can be placed on Salesforce app pages, home pages, or even record pages using Lightning App Builder, giving users a powerful, real-time view everywhere they work.



9.4 Dynamic Dashboards

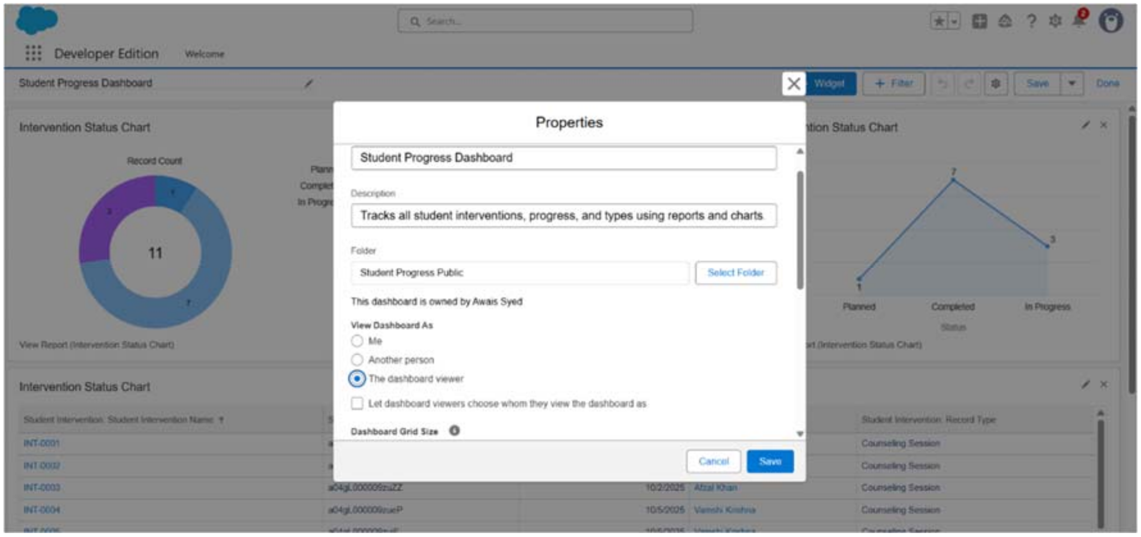
Use Case: Dynamic Dashboards in Salesforce let each user see dashboard data using their own access and security permissions. This keeps information safe and private, while still giving everyone a real-time view of reports that matter to their work. Schools, businesses, or any team can ensure team members only see what they need, avoiding unwanted access to sensitive records.

Implementation Steps:

1. **Go to Dashboards**
    - Use App Launcher → type and select **Dashboards** in search box.
2. **Edit Dashboard**
    - Open your dashboard (e.g., "Student Progress Dashboard").
    - Click **Edit** at the top.
3. **Change Dashboard to Dynamic**
    - Click on **Properties** (gear icon or click dashboard name).
    - For "View Dashboard As", select **"The dashboard viewer"**.
4. **Save and Done**
    - Click **Save** and **Done** in the editor.
    - Move dashboard into a public/shared folder for others to see (optional).

Result and Benefits:

- **Privacy & Custom Data:** Each person only sees data they're allowed to view, keeping records private and secure.
- **Security:** Stops people from seeing sensitive reports if they're not supposed to.
- **Real-Time Personalization:** Data always fits the user's job role and permissions. No more "too much information" on dashboards—everyone knows only what's helpful for them.
- **Easy Management:** Dynamic dashboards can be placed in home, app, or record pages, giving everyone personalized access everywhere they work.



9.5 Sharing Settings

Use Case: The Sharing Settings for Student Intervention objects help restrict and control which users can view or update sensitive student records. For a student success platform, this guarantees that only record owners (such as staff or teachers) and top-level administrators can access or modify student intervention information. This keeps private data secure, supports student privacy, and meets best practice for school/college security needs.

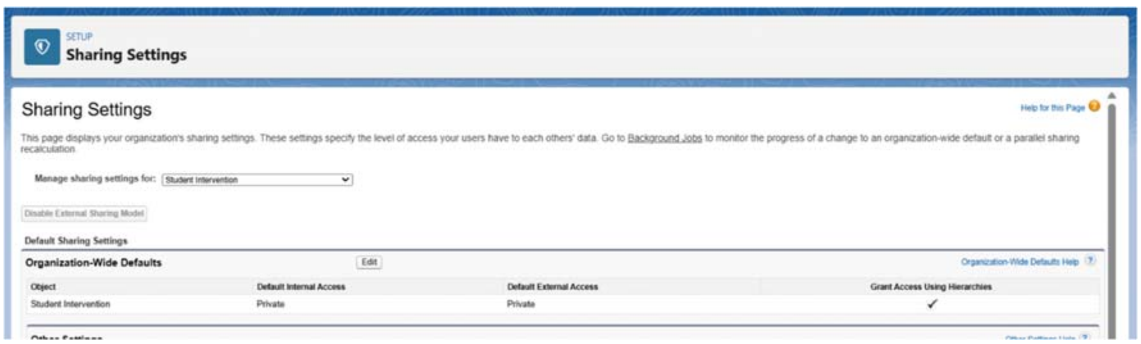
Implementation Steps:

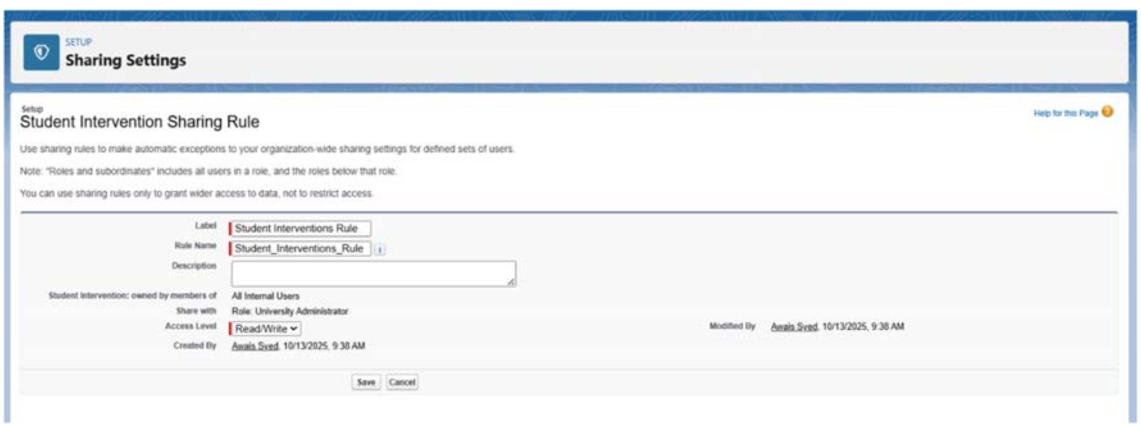
1. **Go to Sharing Settings**
    - Click the gear icon (Setup) → In Quick Find type **"Sharing Settings"**, click Sharing Settings.
2. **Set Organization-Wide Defaults**
    - For the **Student Intervention** object, set Internal and External Access to **Private**.
3. **Create a New Sharing Rule for Student Interventions**
    - Scroll to Student Intervention Sharing Rules section.
    - Click **New Sharing Rule**.
    - For rule details:
        - Label: Student Interventions Rule
        - Rule Name: Student_Interventions_Rule
        - Rule Type: **Based on record owner**
        - Records to Share: Public Groups → All Internal Users

- Share With: Roles → University Administrator
- Access Level: **Read/Write**
- Click **Save**.

Result and Benefits:

1. Only student intervention record owners and their university administrators can see or change records, keeping all other users restricted, which protects sensitive information in the database.
2. This sharing configuration gives organization leaders oversight and control, supporting strong security and privacy for all student intervention data.
3. Audit and compliance are easier, as only the right people can access and update critical records, preventing unauthorized or accidental changes.





9.6 Field Level Security

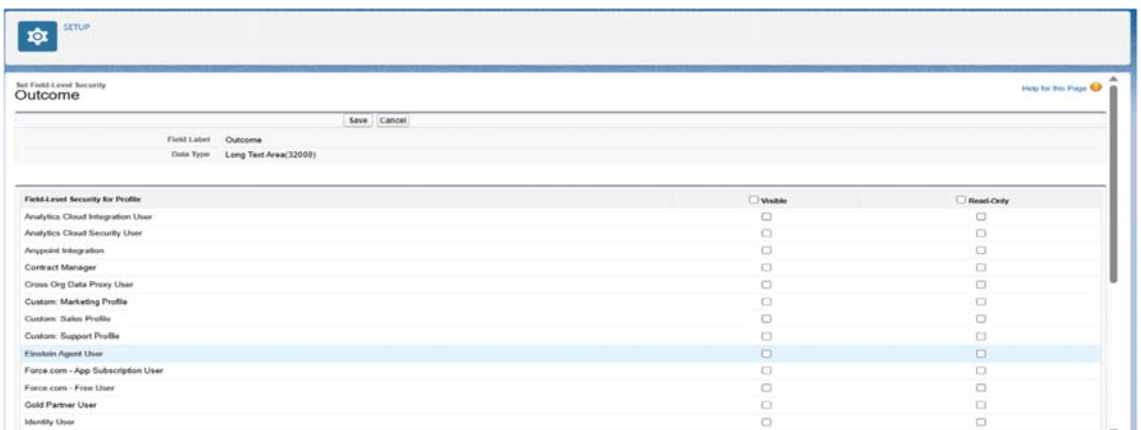
Use Case: Field Level Security (FLS) is important to keep sensitive student data safe in Salesforce. With FLS, only certain users can see or change specific fields, which means student information like grades or health details stays private and is only visible to people who need it.

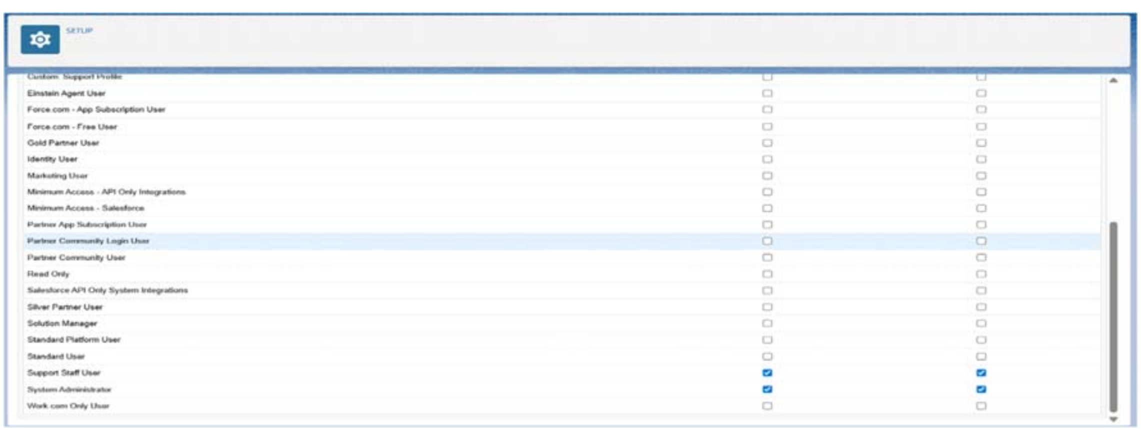
Implementation Steps:

1. Click the "Setup" gear icon.
2. Go to "Object Manager" → Find the object you want (for example: Student).
3. Click the object name → Click "Fields & Relationships."
4. Select the field you want to protect.
5. Click "Set Field-Level Security."
6. For each profile (like Standard User, System Administrator, etc.):
   - Tick "Visible" if the user can see the field.
   - Tick "Read-Only" if the user can only see but not edit the field.
7. Click "Save" to keep changes.

Result and Benefits:

- Student information is only shown to users with permission.
- Teachers can see grades, but other users cannot, unless allowed.
- This keeps private data safe and reduces mistakes or information leaks.
- Students and staff feel more secure because their information is only shared with the right people.





9.7 Session Settings

Use Case: Session Settings help keep the Salesforce account safe. These rules decide when users are logged out, what kind of logins are allowed, and how much security is needed. For students, teachers, and school staff, these settings make sure only the right people can use Salesforce and keep private information safe.

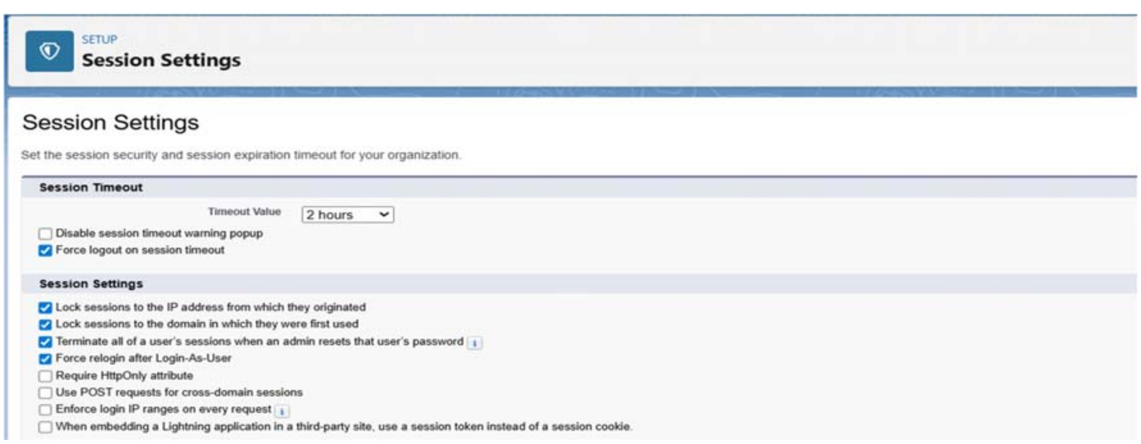
Implementation Steps:

Click on "Session Settings":

- Set "Session Timeout" to "**2 hours**" to automatically log out users after some time.
- Tick "**Force logout on session timeout**" so accounts log off after timeout.
- Tick "**Lock sessions to the IP address from which they originated**" and "**Lock sessions to the domain in which they were first used**" for extra safety.
- Tick "**Terminate all of a user's sessions when an admin resets that user's password**" to protect accounts after password change.
- Tick "**Enable caching and autocomplete on login page**" and "**Enable secure and persistent browser caching to improve performance**" for fast logins.
- Set "Session Security Levels" with "**Username Password**" and "**Multi-Factor Authentication**" in the High Assurance box for the strongest protection.
- Click "Save" at the bottom of the page to keep your changes.

Result and Benefits:

- Users get logged out after 2 hours, making accounts safer.
- Session security reduces the chances of hackers or unauthorized users getting into Salesforce.
- Performance is better with caching, so pages load fast for everyone.
- Multi-Factor Authentication (MFA) stops most attacks by asking for more than just a password.



9.8 Login IP Ranges

Use Case: Login IP Ranges add a layer of safety so only trusted computers on specific networks (like school or office) can log in as System Admins. This helps protect sensitive information and keeps strangers out of Salesforce.

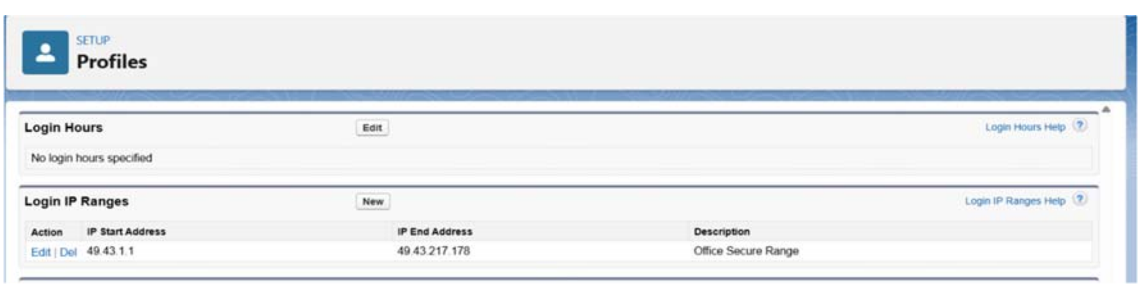
Implementation Steps:

Login IP Ranges for the System Admin profile, this is what was done:

1. Clicked the Setup gear icon (top right in Salesforce).
2. Typed "Profiles" into the left search box and clicked "Profiles".
3. Chose "**System Administrator**" profile from the list.
4. Scrolled down and found "**Login IP Ranges**" section.
5. Clicked "New" to add a new range.
6. Entered Start IP Address: **49.43.1.1** and End IP Address: **49.43.217.178**.
7. Added Description: "Office Secure Range".
8. Clicked "Save" to finish.

Result and Benefits

- Only computers with addresses between 49.43.1.1 and 49.43.217.178 (school/office range) can login as System Admin.
- Keeps Salesforce more secure and stops unauthorized people from logging in.
- Makes it easier for admins to know their login comes from a safe location.



9.9 Audit Trail

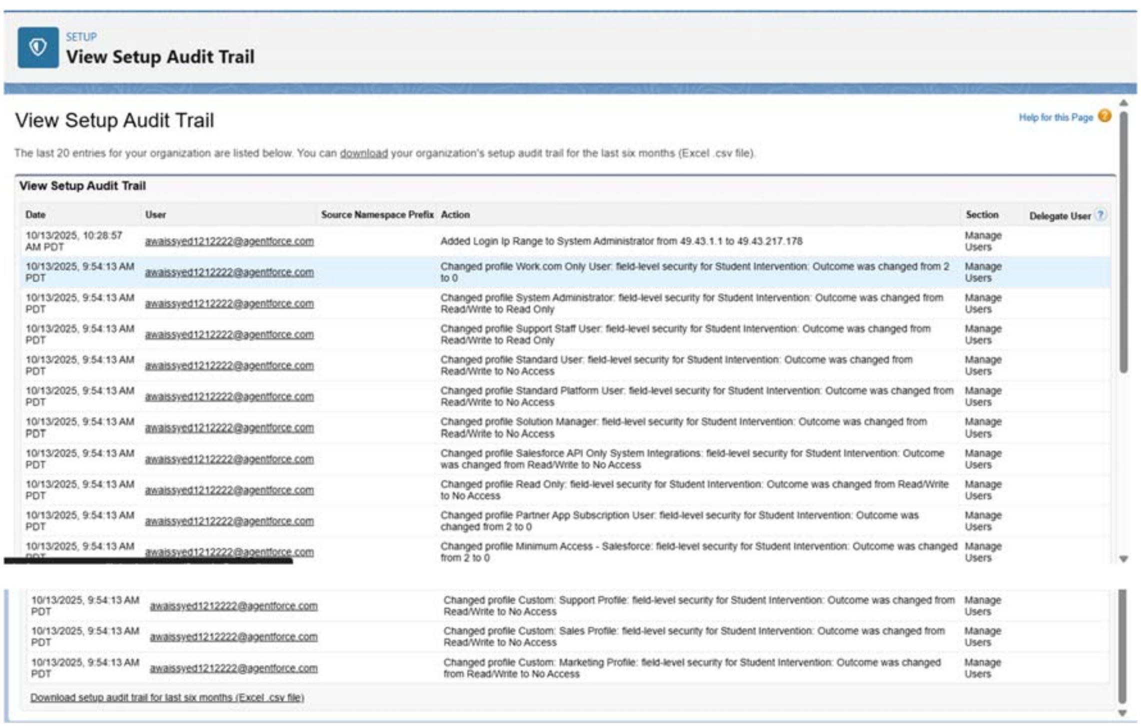
Use Case: Audit Trail helps Salesforce admins keep track of changes made in setup. It is mostly used to see who changed what, and when, making it easier to check for mistakes, security problems, or reasons for errors in Salesforce settings.

Implementation Steps:

1. Click the Setup gear icon at the top right.
2. In the search box on the left, type “View Setup Audit Trail”.
3. Click on “**View Setup Audit Trail**” in the search results.
4. See the list with the 20 most recent setup changes (who changed, what changed, when).
5. (Optional) Click “Download” to save a file with audit history for up to 180 days.
6. For longer history, repeat downloads regularly or use the API for automatic tracking and export.

Result and Benefits:

- Admins see every major change in setup, who did it, and when, so problems can be fixed quickly.
- Helps keep Salesforce safe and ready for compliance checks or security audits.
- Makes it easy to review, find mistakes, and teach others the right way to make changes next time.



SETUP
View Setup Audit Trail

View Setup Audit Trail

Help for this Page

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
10/13/2025, 10:28:57 AM PDT	awaissyed1212222@agentforce.com		Added Login Ip Range to System Administrator from 49.43.1.1 to 49.43.217.178	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Work.com Only User: field-level security for Student Intervention: Outcome was changed from 2 to 0	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile System Administrator: field-level security for Student Intervention: Outcome was changed from Read/Write to Read Only	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Support Staff User: field-level security for Student Intervention: Outcome was changed from Read/Write to Read Only	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Standard User: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Standard Platform User: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Solution Manager: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Read Only: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Partner App Subscription User: field-level security for Student Intervention: Outcome was changed from 2 to 0	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Student Intervention: Outcome was changed from 2 to 0	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Custom: Support Profile: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Custom: Sales Profile: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	
10/13/2025, 9:54:13 AM PDT	awaissyed1212222@agentforce.com		Changed profile Custom: Marketing Profile: field-level security for Student Intervention: Outcome was changed from Read/Write to No Access	Manage Users	

Download setup audit trail for last six months (Excel .csv file)