Project Title: Pet Adoption Tracker

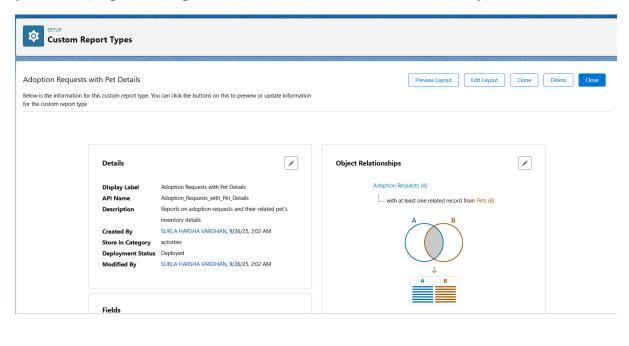## Phase 9: Reporting, Dashboards & Security Review Guide

Objective

Phase 9 validates the completeness and security of the Pet Adoption Tracker. This includes deriving key business insights using reports and dashboards, and demonstrating robust data protection through comprehensive security configurations (FLS, Sharing Settings, and Audit mechanisms).

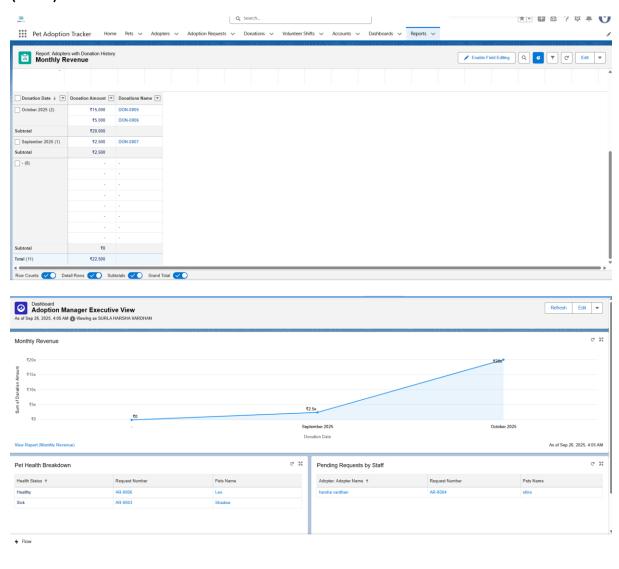
A. Reporting & Analytics

1. Custom Report Types (Foundation)

Purpose: To enable complex reporting that joins your custom objects, allowing managers to gather insights that standard reports cannot provide (e.g., linking Pet attributes to Donation history).

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2. Dashboards (Visualization)

Purpose: To provide the Adoption Manager (Adoption Manager Profile) with a central, graphical view of Key Performance Indicators (KPIs).

3. Sharing Settings (Record Access Control)

Purpose: To define the baseline level of access for records across the entire organization, ensuring sensitive data (Donations, Rejected Requests) is protected while operational data (Available Pets) is widely accessible
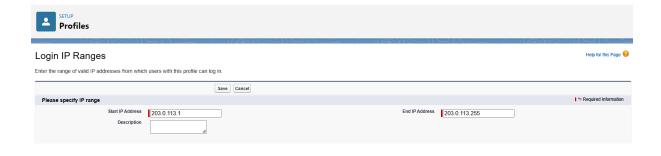
SETUP
Sharing Settings

Streaming Channel	Public Read/Write ∨	Private ∨	☑
Tableau Host Mapping	Public Read Only ∨	Private ∨	☑
User Presence	Public Read Only ∨	Private ∨	☑
Waitlist	Private ∨	Private ∨	☑
Web Cart Document	Private ∨	Private ∨	☑
Work Order	Private ∨	Private ∨	☑
Work Plan	Private ∨	Private ∨	☑
Work Plan Template	Private ∨	Private ∨	☑
Work Step Template	Private ∨	Private ∨	☑
Work Type	Private ∨	Private ∨	☑
Work Type Group	Public Read/Write ∨	Private ∨	☑
Adopter	Public Read/Write ∨	Private ∨	☑
Donation	Public Read/Write ∨	Private ∨	☑
Notification	Public Read/Write ∨	Private ∨	☑
Pet	Public Read/Write ∨	Private ∨	☑
Volunteer Shift	Public Read/Write ∨	Private ∨	☑

User Visibility Settings

Portal User Visibility ☐ ⓘ   Site User Visibility ☐ ⓘ

Other Settings

4. Field Level Security (FLS)

Purpose: To control the visibility and editability of individual sensitive fields, protecting financial and private data from unauthorized user profiles.

SETUP
Profiles

Location Shipping Carrier Method	[View]	Work Step Template	[View]
Macro	[View]	Work Type	[View]
Messaging Session	[View]	Work Type Group	[View]
Messaging User	[View]	Work Type Group Member	[View]

Custom Field-Level Security

Adopter	[View]	Medical Record	[View]
Adoption_Story	[View]	Notification	[View]
Adoption Request	[View]	Pet	[View]
Donation	[View]	Volunteer Shift	[View]
Foster Histories	[View]		

5. Session & Login Security

Purpose: To enforce basic network and session restrictions to minimize the risk of unauthorized external access.

Login IP Ranges

Enter the range of valid IP addresses from which users with this profile can log in.

Save   Cancel

Please specify IP range

❙ *⁼ Required Information

| Start IP Address | 203.0.113.1 | End IP Address | 203.0.113.255 |
| Description | | | |

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6. Setup Audit Trail & Field History

Purpose: To demonstrate how system activity and data changes are tracked for accountability and compliance.

Session Settings   Help for this Page ❓

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value [2 hours ▾]

☐ Disable session timeout warning popup
☑ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated
☑ Lock sessions to the domain in which they were first used
☐ Terminate all of a user's sessions when an admin resets that user's password ⓘ
☑ Force relogin after Login-As-User
☐ Require HttpOnly attribute
☐ Use POST requests for cross-domain sessions
☐ Enforce login IP ranges on every request ⓘ
☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.