

MediCare - Phase 9: Connect Reporting, Dashboards & Security Review

1. Report Types

A custom report type “**Appointments with Patients**” was created so that appointment and patient fields appear in one report. This enabled richer reporting across the MediCare Connect application.

The screenshot shows the MediCare Connect application interface. On the left, there is a sidebar with navigation links: Feature Settings, Analytics, Reports & Dashboards (with sub-links: Access Policies, Historical Trending, Report Types, Reporting Snapshots, Reports and Dashboards Settings), and Security. A search bar at the top has the text 'report'. The main content area is titled 'Custom Report Types' and shows a section for 'Appointments with Patients'. It includes a 'Details' panel with fields like Display Label (Appointments with Patients), API Name (Appointments_with_Patients), Description (Appointments with Patients), Created By (Swarcop Admin, 9/26/25, 5:21 PM), Store in Category (other), Deployment Status (Deployed), and Modified By (Swarcop Admin, 9/26/25, 5:21 PM). There is also an 'Object Relationships' panel illustrating a relationship between 'Appointments (A)' and 'Medical Cases (B)' using a Venn diagram where circles A and B overlap, with arrows pointing to a resulting list of items labeled A and B.

Fig.1 Appointments with Patients Report Type

2. Reports

Four reports were created to cover all standard formats:

- **Tabular Report** – Upcoming Appointments list.
- **Summary Report** – Appointments grouped by Patients.
- **Matrix Report** – Appointments by Day vs Status cross-tab.

The screenshot shows the 'Upcoming_Appointments_Tabular' report. At the top, it displays 'Total Records' (22) and 'Total Duration (Minutes)' (390). Below is a table with columns: Appointment: Appointment Number, Patient, Doctor, Appointment Date/Time, Status, and Duration (Minutes). The data rows are as follows:

	Appointment: Appointment Number	Patient	Doctor	Appointment Date/Time	Status	Duration (Minutes)
1	APT-0022	abc def	Anita Sharma	19/09/2025, 12:00 pm	Scheduled	20
2	APT-0053	testing user	Anita Sharma	23/09/2025, 12:00 pm	Scheduled	20
3	APT-0054	ssss mmm	Anita Sharma	22/09/2025, 12:00 pm	Scheduled	20
4	APT-0052	ssss mmm	Anita Sharma	21/09/2025, 10:48 pm	Scheduled	20
5	APT-0048	ssss mmm	Anita Sharma	09/10/2025, 10:52 pm	Scheduled	20
6	APT-0047	ssss mmm	Anita Sharma	20/09/2025, 10:46 pm	Scheduled	20
7	APT-0044	ssss mmm	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	20
8	APT-0043	ssss mmm	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	20
9	APT-0045	ssss mmm	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	20
10	APT-0040	ssss mmm	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	-
11	APT-0027	ssss mmm	Anita Sharma	19/09/2025, 8:30 pm	Scheduled	20
12	APT-0059	vis mang	Anita Sharma	30/09/2025, 11:15 pm	Scheduled	20
13	APT-0057	vis mang	Anita Sharma	23/09/2025, 9:37 pm	Scheduled	20
14	APT-0055	vis mang	Anita Sharma	22/09/2025, 10:45 pm	Scheduled	20
15	APT-0046	vis mang	Anita Sharma	19/09/2025, 11:00 pm	Scheduled	20
16	APT-0041	vis mang	Anita Sharma	19/09/2025, 11:00 nm	Scheduled	20

Fig.2 Upcoming_Appointments_Tabular

Report: Appointments
Appointments_by_Patient_Summary

<input type="checkbox"/> Patient ↑	Doctor	Appointment Date/Time	Status	Duration (Minutes)
<input type="checkbox"/> abc def (1)	Anita Sharma	19/09/2025, 12:00 pm	Scheduled	20
Subtotal				20
<input type="checkbox"/> MANCHALA D V V S SWAROOP (1)	Anita Sharma	26/09/2025, 11:00 pm	Scheduled	10
Subtotal				10
<input type="checkbox"/> manchala pavani (3)	Anita Sharma	24/09/2025, 1:00 pm	Scheduled	10
	Anita Sharma	22/09/2025, 11:10 pm	Scheduled	20
	Anita Sharma	20/09/2025, 10:57 pm	Scheduled	20
Subtotal				50
<input type="checkbox"/> siva teja (1)	Anita Sharma	24/09/2025, 12:00 pm	Scheduled	10
Subtotal				10
<input type="checkbox"/> ssss mmm (9)	Anita Sharma	22/09/2025, 12:00 pm	Scheduled	20
	Anita Sharma	21/09/2025, 10:48 pm	Scheduled	20
	Anita Sharma	09/10/2025, 10:52 pm	Scheduled	20
	Anita Sharma	20/09/2025, 10:46 pm	Scheduled	20
	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	20
	Anita Sharma	19/09/2025, 11:15 pm	Scheduled	20

Fig.3 Appointments_By_Patient_Summary

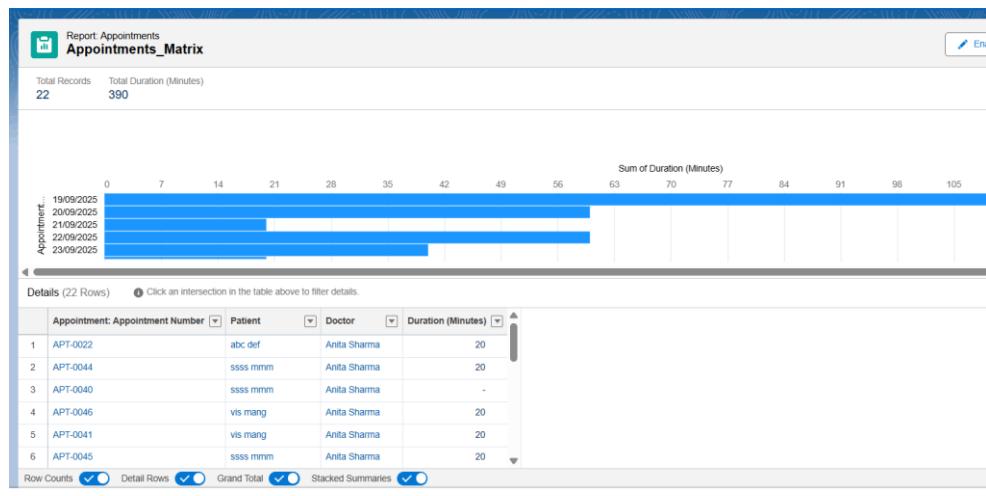


Fig.4 Appointments_Matrix

3. Dashboards

A dashboard “DB_Upcoming_Appointments” was built combining the above reports into visual components (table, donut chart, bar chart). It is stored in the MediCare Dashboards folder and scheduled to refresh daily.

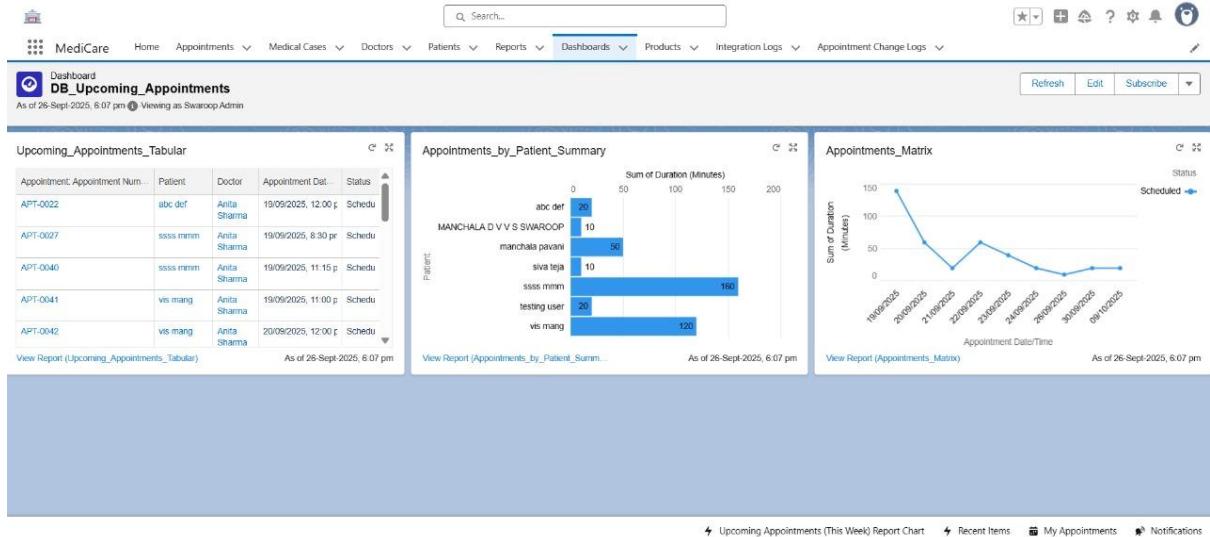


Fig.5 DB_Upcoming_Appointments

4. Dynamic Dashboard

The dashboard was set to “View Dashboard As – The dashboard viewer” so that each logged-in Doctor only sees their own appointment data.

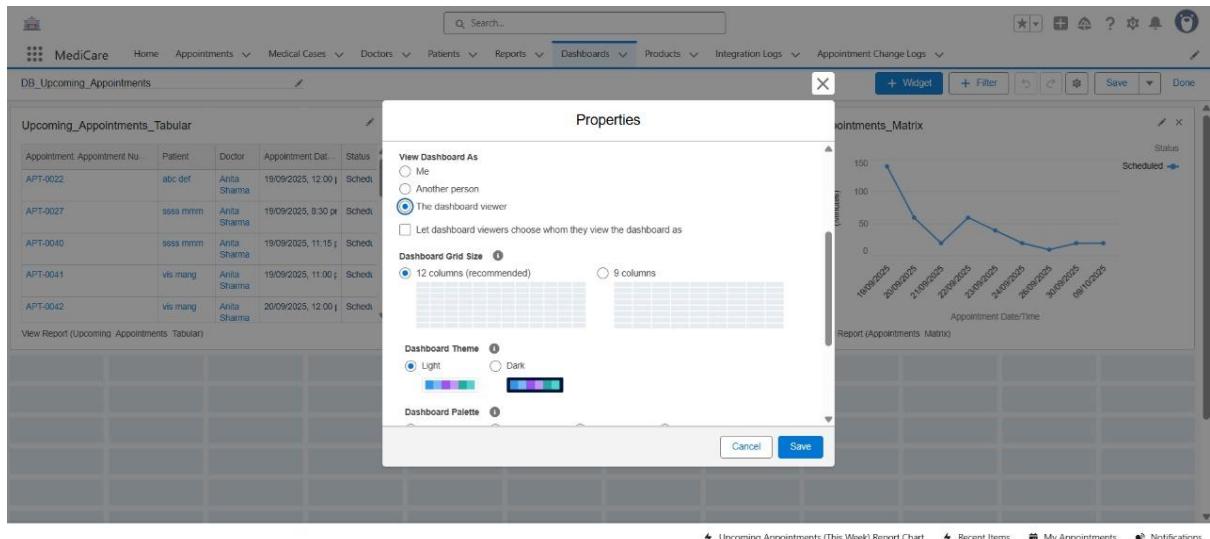


Fig.6 Dashboard_Dynamic

5. Sharing & Folders

Report and dashboard folders (**MediCare Reports**, **MediCare Dashboards**) were created and shared with:

- **Doctor role as Viewer**
- **Receptionist role as Editor**

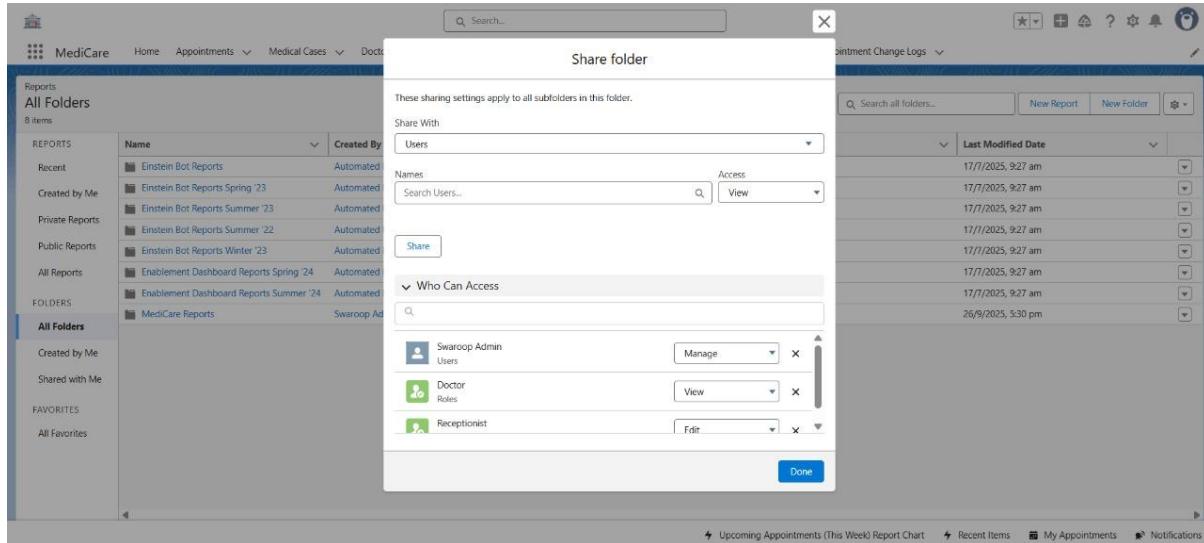


Fig.7 MediCare_Report_Folder_Sharing

6. Sharing Settings

Organization-Wide Defaults were reviewed: Appointment and Medical Case objects are **Private**; sharing rules ensure Doctors only see their own records while Admin has full access.

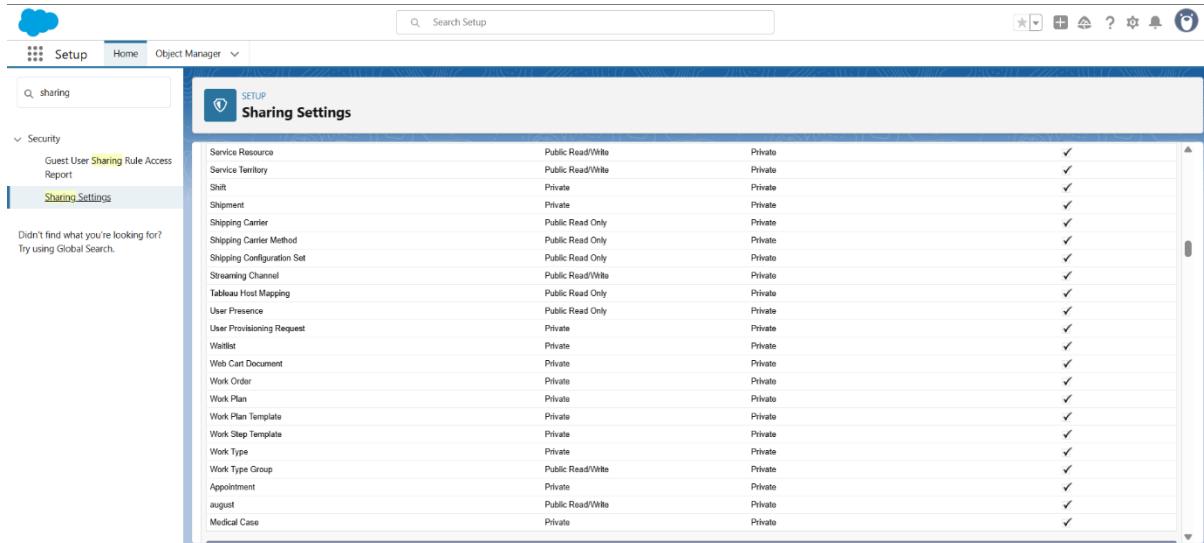


Fig.8 SharingSettings

7. Field-Level Security

Sensitive Medical Case fields (Treatment Plan, Description) were hidden from the Receptionist profile using Field-Level Security so only authorized users can view them.

The screenshot shows a list of user profiles on the left and a grid of checkboxes on the right. The profiles listed are: Force.com - Free User, Gold Partner User, Identity User, Marketing User, Minimum Access - API Only Integrations, Minimum Access - Salesforce, MONDAY, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Receptionist, Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator, and Work.com Only User. The grid has three columns: the first column contains checked boxes for most profiles, the second column contains checked boxes for all profiles, and the third column contains empty boxes for all profiles.

Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MONDAY	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Receptionist	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fig.9 FieldLevelSecurity

8. Permission Sets

For this phase, Permission Sets were not configured. In a real scenario, a “**Doctor Extra Access**” permission set could grant temporary edit rights to Doctors without changing their profile.

9. Session Settings & Login IP Ranges

Session timeout was set to 30 minutes. Login IP ranges can be added to restrict profile logins to specific networks for increased security.

The screenshot shows the Session Settings page. Under Session Timeout, the timeout value is set to 30 minutes, and the "Force logout on session timeout" checkbox is selected. Under Session Settings, several checkboxes are selected: "Lock sessions to the domain in which they were first used" and "Force logout after Login-As-User". Under Extended use of IE11 with Lightning Experience, a note states: "EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED" and "AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.". Under Caching, the "Enable caching and synchronization on login screen" checkbox is selected.

Session Settings

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

Session Timeout

Timeout Value: 30 minutes ▾

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 logout 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.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

Enable caching and synchronization on login screen

Fig.10 SessionSettings

10. Audit Trail & Login History

Setup Audit Trail and Login History were downloaded to demonstrate who changed what and recent user login attempts. These provide evidence of configuration and access control.

Date	User	Source IP	Action	Section	Delegate User
26/09/2025, 6:19:35 pm IST	admin-swaroop@medicare.com		Changed S Session Settings		
26/09/2025, 6:19:35 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:29:26 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:26:26 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:26:20 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:26:20 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:21:41 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:21:38 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:21:38 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:21:37 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:10:20 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 4:10:11 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 3:23:53 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 3:23:41 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 3:18:49 pm IST	admin-swaroop@medicare.com		Session Settings		
26/09/2025, 3:18:49 pm IST	admin-swaroop@medicare.com		Session Settings		
Download setup audit trail for last six months					

Fig.11 AuditTrail

Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL	HTTP Method
admin-swaroop@medicare.com	26/09/2025, 4:54:56 pm IST	223.228.120.24	India	Remote Access 2.0	Success	Unknown	Unknown	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 4:54:52 pm IST	223.228.120.24	India	Remote Access 2.0	Success	Unknown	Unknown	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 4:54:52 pm IST	223.228.120.24	India	Remote Access 2.0	Success	Unknown	Unknown	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 4:54:52 pm IST	223.228.120.24	India	Remote Access 2.0	Success	Unknown	Unknown	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 4:54:52 pm IST	223.228.120.24	India	Remote Access 2.0	Success	Unknown	Unknown	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 1:11:12 pm IST	223.185.48.15	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	orgfarm-a41ddff57c-dev-ed-develop.my.salesforce.com	POST
admin-swaroop@medicare.com	26/09/2025, 8:54:26 am IST	122.177.245.142	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	orgfarm-a41ddff57c-dev-ed-develop.my.salesforce.com	POST
admin-swaroop@medicare.com	25/09/2025, 8:43:07 pm IST	122.177.245.206	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	25/09/2025, 6:29:16 pm IST	155.226.153.254	Canada	Remote Access 2.0	Success	Unknown	Unknown	MediCare External Client App	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	25/09/2025, 6:29:12 pm IST	122.177.245.206	India	Remote Access Client	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	login.salesforce.com	GET
admin-swaroop@medicare.com	25/09/2025, 4:46:07 pm IST	122.177.245.206	India	Remote Access 2.0	Success	Unknown	Unknown	MediCare External Client App	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	25/09/2025, 2:08:47 pm IST	122.177.245.206	India	Remote Access 2.0	Success	Unknown	Unknown	MediCare External Client App	N/A	N/A	N/A	login.salesforce.com	POST
admin-swaroop@medicare.com	25/09/2025, 11:18:27 am IST	122.177.245.206	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	orgfarm-a41ddff57c-dev-ed-develop.my.salesforce.com	POST
admin-swaroop@medicare.com	24/09/2025, 11:01:33 pm IST	122.177.245.148	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	orgfarm-a41ddff57c-dev-ed-develop.my.salesforce.com	POST
admin-swaroop@medicare.com	24/09/2025, 3:42:49 pm IST	106.200.25.224	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	orgfarm-a41ddff57c-dev-ed-develop.my.salesforce.com	POST

Fig.12 Login History