Phase 9: Reporting, Dashboards & Security Review

This phase concluded the project implementation by delivering the critical business intelligence layer required for managerial oversight and efficient operational work. All reports leverage the specialized data model defined in Phase 3.

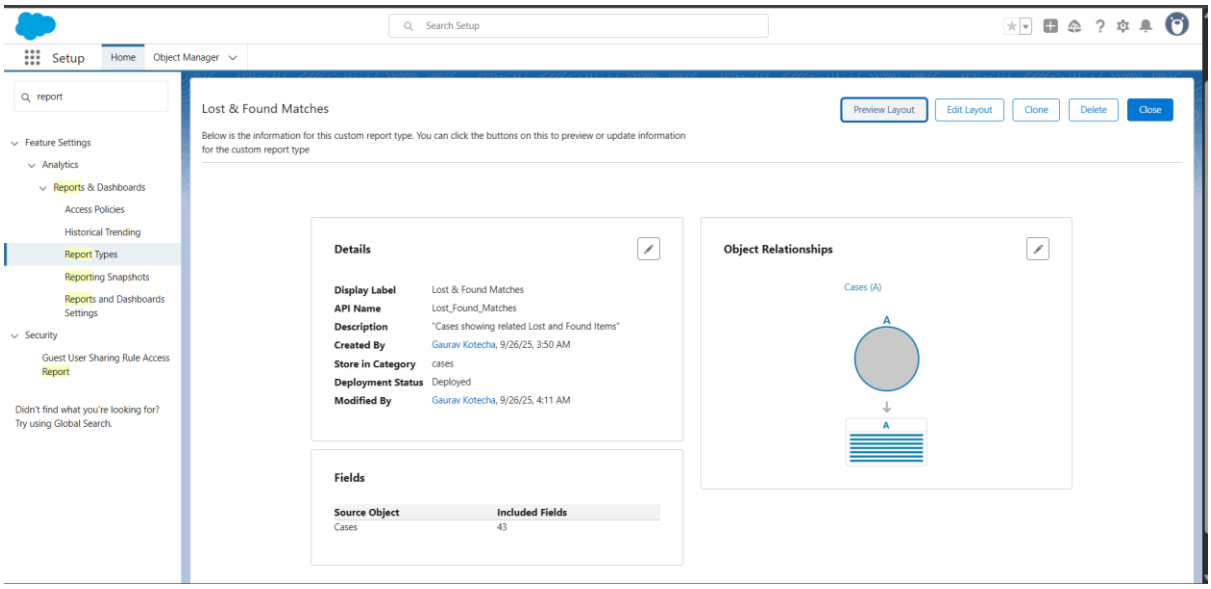
Concept	Project Goal
Reporting Strategy	Provide both a **strategic view** (Backlog Inventory) and an **operational view** (Agent Action Queue) by linking the three core objects (Case, Lost Item, Found Item) to ensure maximum context.

9.1 Reporting Foundation and Custom Report Types

The foundation of the visibility solution was the creation of a specialized Custom Report Type that allows data from the three linked objects to be presented coherently.

Concept	Implementation Details	Purpose
Custom Report Type	Created the **Lost & Found Matches** Custom Report Type (Case with/and Related Lost Item and Related Found Item).	**Crucial:** This structure allows reports to display the status of the Case, the details of the Lost Item claim, and the details of the Found Item evidence all on a single line.

Custom Report Type Definition



9.2 Operational and Strategic Reports

Two primary reports were developed to serve the distinct needs of the Security Staff (operational) and the Management team (strategic).

9.2.1 Report 02: Agent Action Queue (Operational Worklist)

- **Report Name:** 02 - Potential Matches & Pending Cases
- **Report Type:** Tabular/Summary
- **Filters:** Case Status = New and Case Owner = Verification Queue
- **Key Design:** This report utilizes the **Summary Formula Fields** from Phase 3 to provide rapid context:
    - Columns include: **Case Number**, **Case Owner**, **Lost Item Summary (Formula)**, and **Found Item Summary (Formula)**.
- **Value:** It acts as the Security Staff's daily, prioritized work queue, allowing them to perform visual triage of matches *without* opening the case record.

9.2.2 Report 01: Inventory Backlog (Strategic View)

- **Report Name:** 01 - Open Lost Items Report (Inventory Backlog)
- **Report Type:** Summary
- **Filters:** Lost Item Status != Claimed (or equivalent Closed status)
- **Key Design:** Grouped by **Category** and uses a summary field (COUNT) to tally the total number of open items.
- **Value:** Provides management with the overall institutional liability, quantifying the total volume of unclaimed property by type (e.g., "34 items in Electronics").

9.3 Dashboard Implementation

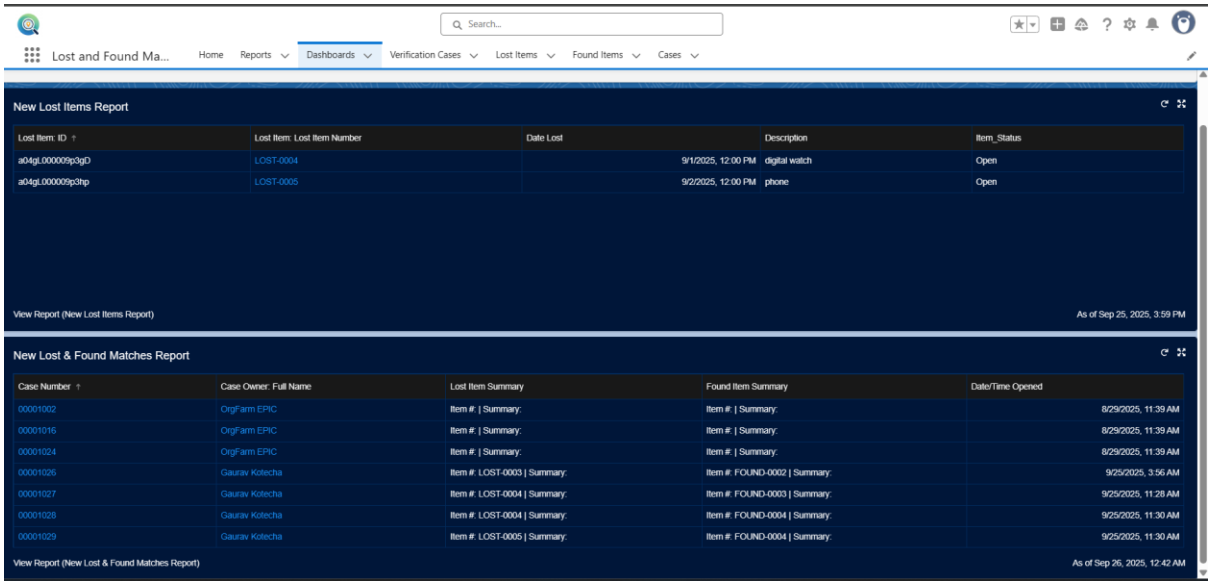
9.3.1 Lost & Found Manager Overview Dashboard

This is the single source of truth for all operational performance.

- **Components Included:**
    1. **Pending Matches (Workload):** Table or Gauge component displaying the results of **Report 02** (Agent Action Queue).
    2. **Open Inventory:** Gauge or Metric chart tracking the total number of items from **Report 01** (Inventory Backlog).

3. **Resolution Trend:** Line or Bar Chart tracking the count of cases successfully closed over time (e.g., *Case Status = Resolved*), used to measure team efficiency.

- **Sharing:** The Dashboard was saved in a dedicated **Public Folder** accessible by the **Manager Role** to ensure visibility and adherence to the security model.



9.4 Security Review & Auditing

The project concluded with a formal security review to ensure the implementation did not compromise data integrity established in Phase 2.

- **Field Level Security (FLS):** Confirmed FLS on custom fields, ensuring that while the Security Staff can see all necessary data, sensitive fields (like claimant contact details) are protected or hidden from irrelevant profiles.
- **Session Settings:** Reviewed and enforced appropriate session timeouts and security controls to mitigate unauthorized access to the portal.