

Phase 9: Reporting, Dashboards & Security Review

Project: Visitor CheckIn System for Offices

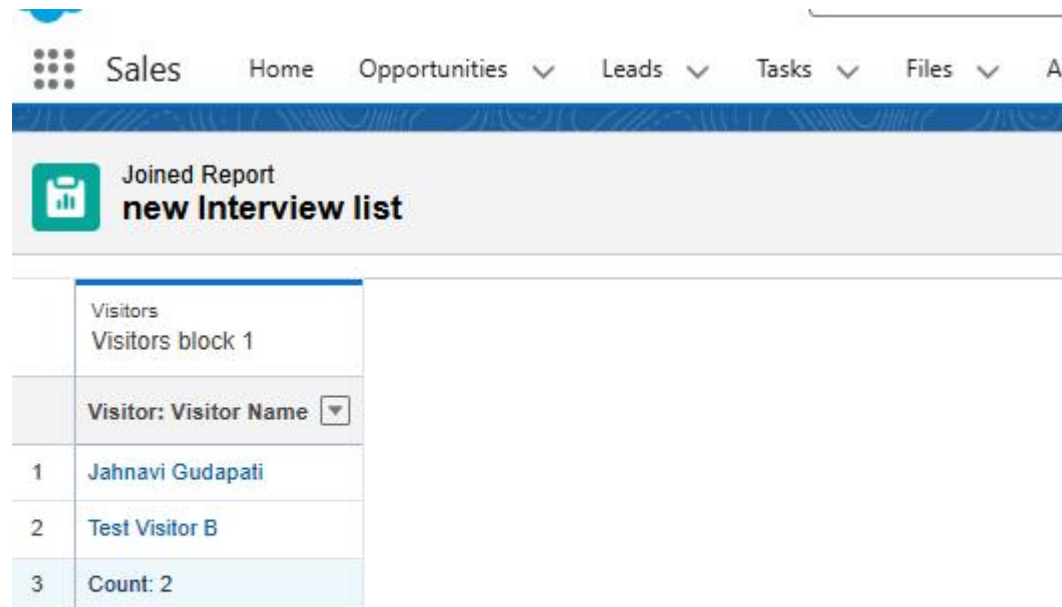
1. Reports

UseCase:

Reports help analyze visitor data by displaying it in different formats. In our Visitor Management project, we used reports to track visitor check-ins and analyze visits by purpose.

Steps Done:

- Created a Tabular Report to list all Visitor__c records with Name, Email, Purpose, and Check-In Time.
- Built a Summary Report grouped by Purpose of Visit.
- Built a Matrix Report to compare Visitor Purpose vs. Host Employee.
- Created a Joined Report to compare Visitor__c with another object (like Host Employee).



Visitors	
Visitors block 1	
Visitor: Visitor Name ▼	
1	Jahnvi Gudapati
2	Test Visitor B
3	Count: 2

2. Report Types

UseCase:

Custom Report Types allow reporting on custom objects. Since we created Visitor__c, we needed a **Custom Report Type** to generate reports on visitors.

Steps Done:

- Setup → Report Types → New.
- Primary Object: Visitor__c.

- Deployed report type and used it to generate visitor reports.

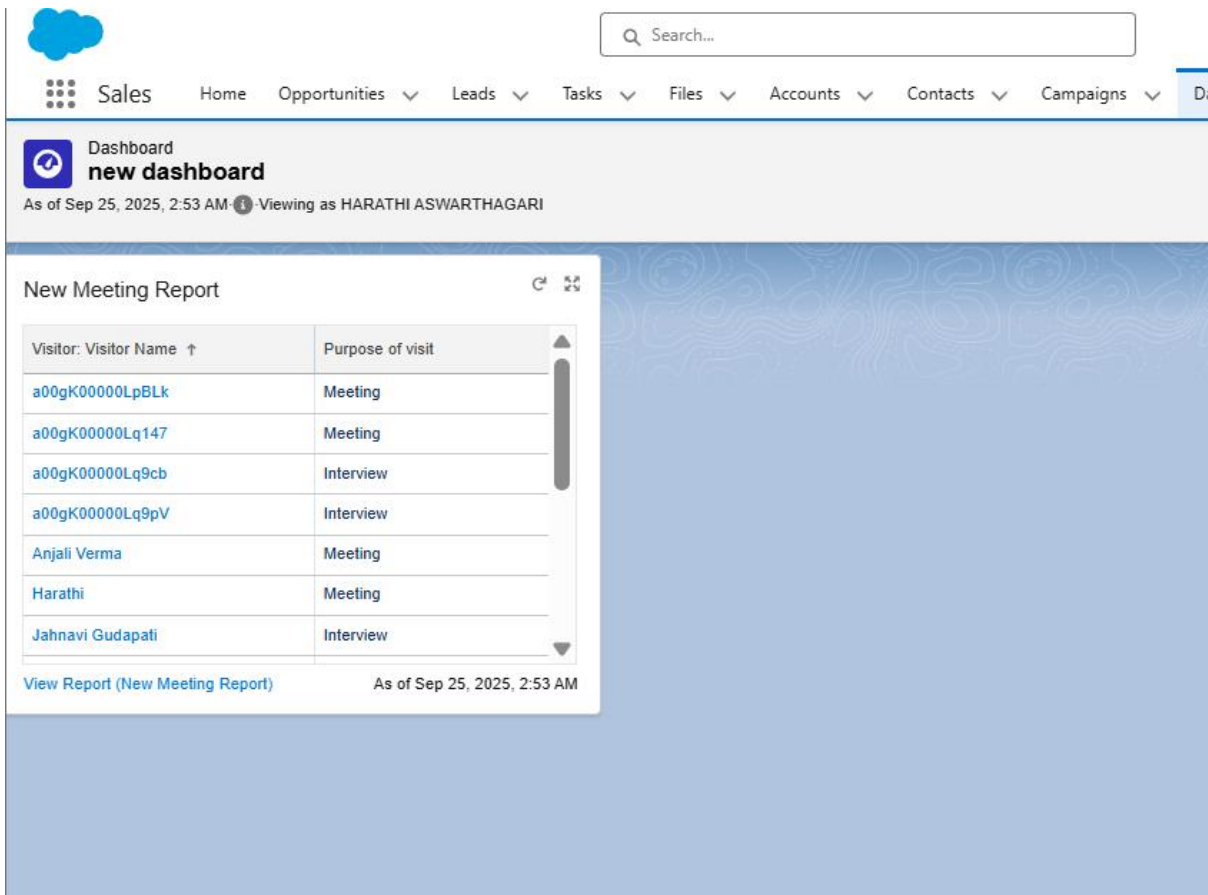
3. Dashboards & Dynamic Dashboards

UseCase:

Dashboards visualize report data with charts and metrics. Dynamic Dashboards display information based on the logged-in user's access.

Steps Done:

- Created a Dashboard to show:
 - Pie chart of Visitors by Purpose.
 - Bar chart of Visitors per Host Employee.
 - Line chart of Visitors over time.
- Configured a **Dynamic Dashboard** so each Host Employee only sees their visitors.



The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with a search bar and a menu containing 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', and 'Campaigns'. Below the navigation bar, the dashboard title 'new dashboard' is displayed, along with the date and time 'As of Sep 25, 2025, 2:53 AM' and the user 'Viewing as HARATHI ASWARTHAGARI'. The main content area features a 'New Meeting Report' table with two columns: 'Visitor: Visitor Name' and 'Purpose of visit'. The table lists seven visitors and their corresponding visit purposes. At the bottom of the table, there is a link to 'View Report (New Meeting Report)' and the date and time 'As of Sep 25, 2025, 2:53 AM'.

Visitor: Visitor Name ↑	Purpose of visit
a00gK00000LpBLk	Meeting
a00gK00000Lq147	Meeting
a00gK00000Lq9cb	Interview
a00gK00000Lq9pV	Interview
Anjali Verma	Meeting
Harathi	Meeting
Jahnvi Gudapati	Interview

[View Report \(New Meeting Report\)](#) As of Sep 25, 2025, 2:53 AM

4. Profiles

UseCase:

Profiles control object-level and field-level permissions. In our project, we created separate profiles for Receptionist (can create visitor records) and Host Employee (can only view visitors).

Steps Done:

- Created a custom profile Visitor Receptionist.

- Assigned CRUD permissions on Visitor__c.
- Restricted Host Employee profile to Read-only access.

5. Roles

UseCase:

Roles determine record visibility in role hierarchy. Receptionists should see all visitors, but employees should only see their own.

Steps Done:

- Created a Role Hierarchy with:
 - Receptionist at the top to handle visitor's information.
 - Host Employees below.
- Assigned users to roles.

The screenshot shows the 'Roles' setup page in Salesforce. At the top, there's a 'SETUP Roles' header with a user icon. Below this, the title 'Creating the Role Hierarchy' is displayed. A message states: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**'. Under the heading 'Your Organization's Role Hierarchy', there are links for 'Collapse All' and 'Expand All'. The role hierarchy is visualized as a tree structure starting with 'MITS' at the root. Below 'MITS' is 'Add Role'. Under 'Add Role' is 'CEO', which has 'Edit', 'Del', and 'Assign' actions. Below 'CEO' is 'Add Role'. Under 'Add Role' is 'Receptionist', which has 'Edit', 'Del', and 'Assign' actions. Below 'Receptionist' is 'Add Role'. Under 'Add Role' is 'Security Guard', which has 'Edit', 'Del', and 'Assign' actions. Below 'Security Guard' is 'Add Role'. Under 'Add Role' is 'Monitor Visitor Details', which has 'Edit', 'Del', and 'Assign' actions. Below 'Monitor Visitor Details' is 'Add Role'. Under 'Add Role' is 'SVP, Customer Service & Support', which has 'Edit', 'Del', and 'Assign' actions. Below 'SVP, Customer Service & Support' is 'Add Role'. Under 'Add Role' is 'SVP, Human Resources', which has 'Edit', 'Del', and 'Assign' actions. Below 'SVP, Human Resources' is 'Add Role'. Under 'Add Role' is 'SVP, Sales & Marketing', which has 'Edit', 'Del', and 'Assign' actions. Below 'SVP, Sales & Marketing' is 'Add Role'. Under 'Add Role' is 'Visitor Manager', which has 'Edit', 'Del', and 'Assign' actions. Below 'Visitor Manager' is 'Add Role'. Under 'Add Role' is 'Creating Updating Reporting details', which has 'Edit', 'Del', and 'Assign' actions. Below 'Creating Updating Reporting details' is 'Add Role'. Under 'Add Role' is 'Recording details', which has 'Edit', 'Del', and 'Assign' actions. Below 'Recording details' is 'Add Role'.

6. Permission Sets

UseCase:

Permission Sets provide extra access without changing profiles. For example, giving an employee temporary ability to export reports.

Steps Done:

- Created a Visitor Reporting Permission Set.
- Granted “Run Reports” and “Export Reports” permissions.
- Assigned it to selected users.

7. Organization-Wide Defaults (OWD)

UseCase:

OWD defines the default record access. For visitors, we restricted access to **Private** so that only owners (receptionists) and higher roles can see them.

Steps Done:

- Setup → Sharing Settings → OWD.
- Visitor__c set to **Private**.

Visit	Public Read/Write	Private	✓
Visitor	Public Read/Write	Private	✓

8. Sharing Rules

UseCase:

Sharing Rules open up record visibility beyond OWD. For example, share all Visitor__c records with the Security Team.

Steps Done:

- Setup → Sharing Rules.
- Object: Visitor__c.
- Rule: Share with Security Team Public Group.

Visitor Sharing Rules			
		New Recalculate	Visitor Sharing Rules Help ?
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role and Internal Subordinates: Receptionist	Role and Internal Subordinates: Visitor Manager	Read/Write

9. Field Level Security (FLS)

UseCase:

FLS restricts access to specific fields. For example, ID Proof Number should only be visible to security personnel, not hosts.

Steps Done:

- Edited Visitor Receptionist Profile → removed visibility for sensitive fields.
- Ensured Security Profile can see ID Proof Number.

10. Session Settings

UseCase:

Session settings improve login security, e.g., session timeouts or requiring re-authentication for critical actions.

Steps Done:

- Setup → Session Settings.
- Configured Timeout = 1 Hour.
- Enabled “Lock sessions to IP address”.

11. Login IP Ranges

UseCase:

Restricts login access to specific IP ranges (e.g., office network only).

Steps Done:

- Setup → Profiles → Receptionist Profile.
- Set Login IP Range (Company network IP range).

12. Audit Trail

UseCase:

Audit Trail tracks configuration changes. Useful for monitoring admin changes in Visitor Management.

Steps Done:

- Setup → View Setup Audit Trail.
- Verified changes such as Profile modifications and OWD updates.



SETUP

View Setup Audit Trail

AM PDT	22691a0566732@agentforce.com	Changed Use POST requests for cross-domain sessions attribute from on to on	Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed clickjack protection for customer Visualforce pages with standard headers attribute from off to on	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed Require HttpOnly attribute from off to on	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed Terminate all of a user's sessions when an admin resets that user's password from off to on	
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Organization setup action: killUISessionsOnPwdResetOffOn has changed.	
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Passwordless Login was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Lightning Login was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Activation was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Delegated Authentication was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Username Password was set to Standard	Session Settings
9/25/2025, 3:28:50 AM PDT	22691a0566732@agentforce.com	Changed profile Employee Profile: field-level security for Visitor: ID Proof Number was changed from Read/Write to No Access	Manage Users
9/25/2025, 3:27:02 AM PDT	22691a0566732@agentforce.com	Completed Owner Rule: Visitor recalculation: Employee Access	Sharing Rules
9/25/2025, 3:27:01 AM PDT	22691a0566732@agentforce.com	Created Visitor Owner Sharing Rule Employee Access	Sharing Rules
9/25/2025, 3:27:01 AM PDT	22691a0566732@agentforce.com	Initiated Owner Rule: Visitor recalculation: Employee Access	Sharing Rules
9/25/2025, 3:22:34 AM PDT	22691a0566732@agentforce.com	Created new role Creating Updating Reporting details	Manage Users
9/25/2025, 3:21:14 AM PDT	22691a0566732@agentforce.com	Created new role Monitor Visitor Details	Manage Users
9/25/2025, 3:20:56 AM PDT	22691a0566732@agentforce.com	Deleted role Monitor Visitor Details	Manage Users
9/25/2025, 3:20:15 AM PDT	22691a0566732@agentforce.com	Created new role Monitor Visitor Details	Manage Users
9/25/2025, 3:19:27 AM PDT	22691a0566732@agentforce.com	Deleted role CFO	Manage Users

[Download setup audit trail for last six months \(Excel .csv file\)](#)