

Phase 9: Reporting, Dashboards & Security Review

1. Reports (Tabular, Summary, Matrix, Joined)

- **Definition:** Salesforce reports are organized displays of data, available in different formats:
 - **Tabular:** Simple list of records.
 - **Summary:** Grouped data with summaries.
 - **Matrix:** Data grouped by rows and columns.
 - **Joined:** Combines multiple reports into one.
 - **Purpose in NeuroWell:** To analyze mental wellness data and user activity efficiently.
 - **Example Use:**
 - Tabular report: List of all patient wellness scores.
 - Summary report: Group patient stress levels by counselor.
 - Matrix report: Stress levels grouped by patient age and gender.
 - Joined report: Combine session data with patient details.
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2. Report Types

- **Definition:** Templates that define which fields and objects are available for reports.
 - **Purpose in NeuroWell:** Allows creating custom reports for specific wellness tracking needs.
 - **Example Use:** Custom report type combining Patient and Session objects to analyze therapy effectiveness.
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3. Dashboards & Dynamic Dashboards

- **Definition:** Dashboards visually display reports as charts, gauges, tables, and metrics.
- **Dynamic Dashboards:** Display data tailored to the logged-in user.
- **Purpose in NeuroWell:** Provides visual insights into patient wellness trends and counselor performance.
- **Example Use:** Dashboard showing real-time average stress levels across patient groups.

4. Profiles

- **Definition:** Define user permissions and access to objects, fields, and functionality.
- **Purpose in NeuroWell:** Control access for different user types (e.g., Admins, Counselors, Patients).
- **Example Use:** Profile for counselors with access to session notes but not to patient billing data.

5. Roles

- **Definition:** Define record-level access in the hierarchy of users.
- **Purpose in NeuroWell:** Allow counselors to see only their patients' data while managers see all.
- **Example Use:** Role hierarchy so a Senior Counselor can see sessions for all counselors they supervise.

6. Users

- **Definition:** Salesforce accounts for individuals with access to the org.
- **Purpose in NeuroWell:** Assign specific access levels and roles.
- **Example Use:** Create users for counselors, admins, and external partners with relevant access.

7. Permission Sets

- **Definition:** Additional permissions assigned to users without changing profiles.
- **Purpose in NeuroWell:** Grant special access for temporary tasks or specific features.
- **Example Use:** Permission set giving access to a new analytics dashboard for certain counselors.

8. OWD (Organization-Wide Defaults)

- **Definition:** Base level of access for records in Salesforce.

- **Purpose in NeuroWell:** Define default privacy level for patient data.
 - **Example Use:** Setting Patient records to private by default, allowing access only through sharing rules.
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9. Sharing Rules

- **Definition:** Automates record access sharing beyond OWD.
 - **Purpose in NeuroWell:** Facilitate secure collaboration.
 - **Example Use:** Sharing patient wellness records with a counselor's role group.
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10. Sharing Settings

- **Definition:** Controls how records are shared and accessed in Salesforce.
 - **Purpose in NeuroWell:** Ensures compliance with data privacy requirements.
 - **Example Use:** Restricting access to patient sessions to assigned counselors only.
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11. Field Level Security

- **Definition:** Controls visibility and edit access for specific fields.
 - **Purpose in NeuroWell:** Protect sensitive mental health data fields.
 - **Example Use:** Restrict access to certain patient health details except for the assigned counselor.
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12. Session Settings

- **Definition:** Security settings that control session duration and behavior.
 - **Purpose in NeuroWell:** Enhance data security for sensitive patient records.
 - **Example Use:** Auto logout after inactivity to protect patient data.
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13. Login IP Ranges

- **Definition:** Restrict login access to specific IP addresses.
- **Purpose in NeuroWell:** Prevent unauthorized access to patient data.

- **Example Use:** Restrict counselor logins to clinic network IPs.
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14. Audit Trail

- **Definition:** Tracks changes made in Salesforce, including setup changes.
- **Purpose in NeuroWell:** Ensures accountability and helps troubleshoot changes.
- **Example Use:** Tracking who updated patient wellness records and when.