Phase 9

Reports & Dashboards

This document provides the step-by-step instructions to create Reports and Dashboards in Salesforce as part of Phase 9 implementation, including report types and dashboard types.

1. Reports

Salesforce offers different types of reports depending on the analysis needed.

Report Types

- Tabular Reports: Simple lists of data; ideal for exporting or quick views. Example: Student List, Attendance List.
- Summary Reports: Grouped data with subtotals; useful for summaries. Example: Class-wise Student Count, Attendance Percentage by Class.
- Matrix Reports: Data grouped by rows and columns; ideal for cross-tab analysis. Example: Attendance Matrix (Classes vs Months), Grades Matrix (Subjects vs Terms).
- Joined Reports: Combine multiple report types into one view; good for holistic performance. Example: Student + Attendance + Grades, Course Enrollment + Completion Rate.

Steps to Create Reports

- Go to the App Launcher (9 dots) and search for 'Reports'.
- Click on 'New Report'.
- Choose the appropriate report type (Tabular, Summary, Matrix, Joined) based on your data needs.
- Click 'Continue'.
- Add required filters (e.g., filter by 'Status = Active' for Students).
- Drag and drop fields into the report outline (such as Name, Program, Semester, Fee Paid).
- Group data if required (Summary/Matrix reports).
- Click 'Run' to preview the data.
- Save the report with a suitable name and folder (e.g., 'Student Reports').
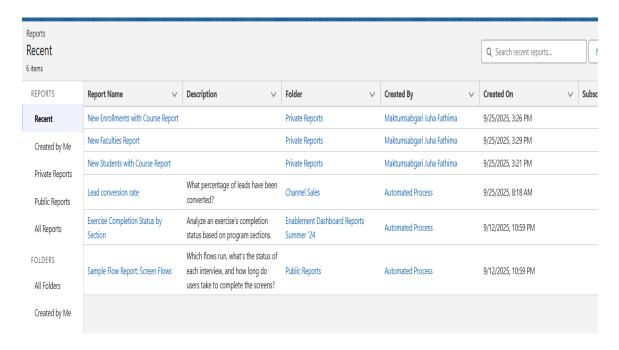
Report: Enrollments with Course
New Enrollments with Course Report

Total Records
6

	Enrollment: Enrollment Number ▽	Course: Course Name ▽
1	ENR-0107	Electronics
2	ENR-0106	Electronics
3	ENR-0105	Electronics
4	ENR-0104	Electronics
5	ENR-0101	Electronics
6	ENR-0108	Python

Reports
Recent
6 items

Q Search recent reports...

REPORTS	Report Name ⌄	Description ⌄	Folder ⌄	Created By ⌄	Created On ⌄	Subsc
Recent	New Enrollments with Course Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:26 PM	
Created by Me	New Faculties Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:29 PM	
Private Reports	New Students with Course Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:21 PM	
Public Reports	Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/25/2025, 8:18 AM	
All Reports	Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Enablement Dashboard Reports Summer '24	Automated Process	9/12/2025, 10:59 PM	
FOLDERS	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/12/2025, 10:59 PM	
All Folders						
Created by Me						

2. Dashboards

Dashboards allow visual representation of reports. Each dashboard can contain multiple components based on report charts.

Dashboard Types

- Chart Component: Visual charts like bar, line, pie, or donut charts.
- Gauge Component: Shows a single metric in a gauge style, useful for targets.
- Metric Component: Displays a single number or KPI metric.
- Table Component: Displays tabular data from reports.
- Visualforce Component: Embeds Visualforce pages or custom content in dashboard.

Steps to Create Dashboards

- Go to the App Launcher and search for 'Dashboards'.
- Click on 'New Dashboard'.
- Enter the Dashboard Name (e.g., Student & Fee Insights) and select a folder.
- Click 'Create'.
- Click '+ Component' to add a chart or table.
- Select the source report (e.g., 'Fee Payment by Semester').
- Choose the display type (bar chart, pie chart, line chart, gauge, metric, table, etc.).
- Adjust chart settings like labels, legends, and filters.
- Click 'Add' and repeat to add more components.
- Save the dashboard and click 'Done'.
- View the dashboard to monitor reports visually.

Q Search

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aktur   athim

Rename Folder

*Folder Label

Codsphere reports

*Folder Unique Name

Codspherereports

Cancel   Save

⠿ CodeSphere Institute   Students ⌄   Courses ⌄   Faculties ⌄   Enrollments ⌄   Fee Payments ⌄   Chatter   Dashboards ⌄   Reports ⌄   Files ⌄

Student Overview   ✎   + Widget   + Filter   ↶ ↷ ⚙   Save ▼   Done

Faculty: Faculty Name   ✎ 🗑

| All ▼ |

New Faculties Report ▼ ✎ X	New Enrollments with Course Report ▼ ✎ X	New Students with Course Report ▼ ✎ X

Faculty: Faculty Name ↑
Basha
Nida
Reshma
Riya

Enrollment: Enrollment Number ↑	Course: Course Name
ENR-0101	Electronics
ENR-0104	Electronics
ENR-0105	Electronics
ENR-0106	Electronics
ENR-0107	Electronics
ENR-0108	Python

Student: Student Name ↑	Course: Course Name
Nida	Electronics
pallavi	Electronics
zaira	Electronics
Zuha Fathima	Electronics
Zuhaib	Python

View Report (New Faculties Report)   View Report (New Enrollments with Course Report)   View Report (New Students with Course Report)