

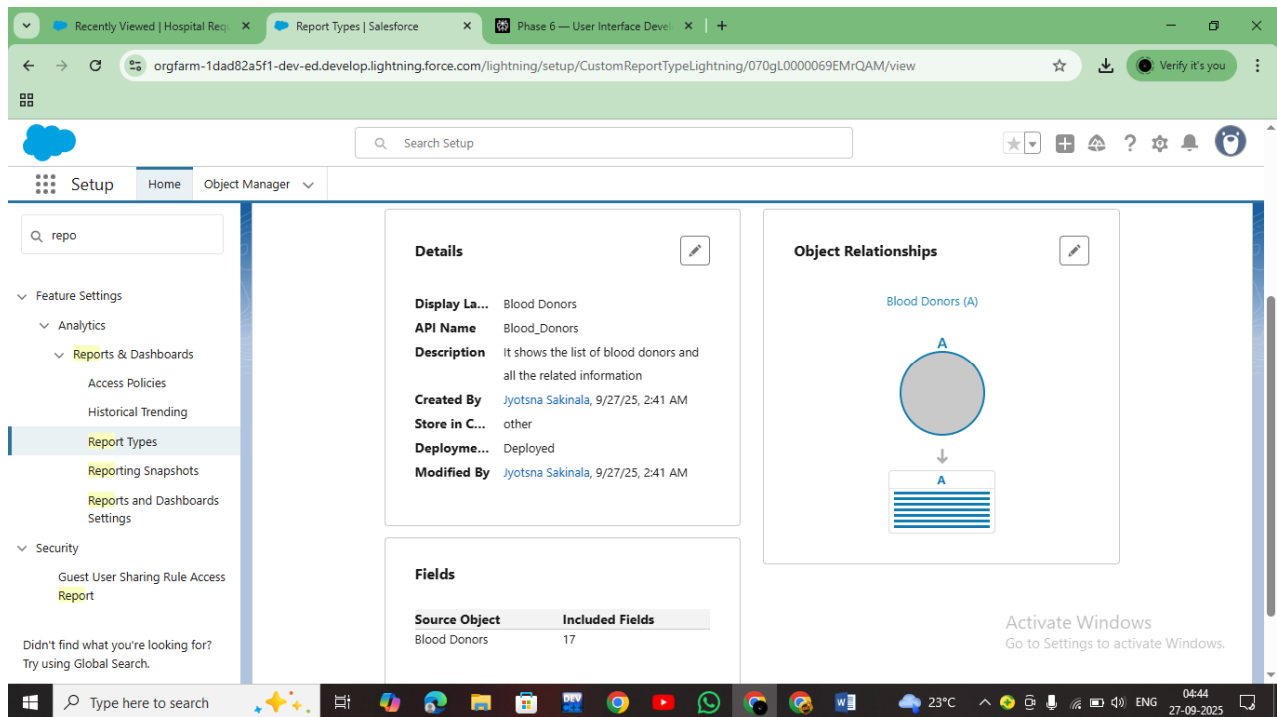
Phase 9: Reporting, Dashboards & Security Review

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

- Created critical reports for Blood Donors, Blood Requests, Hospital Requests, and Inventory.
- Used report formats appropriate to data needs:
 - Tabular for simple lists
 - Summary and Matrix for grouped/comparative data
 - Joined reports to combine related data sets
- Enabled users to gain insights on donor activity, requests, and inventory status.

2. Report Types

- Defined custom report types (e.g., Blood Request with related Donor) for flexible reporting.
- Supported comprehensive reporting tailored to Blood Donation System requirements.



Recently Viewed | Hospital Req | Report Types | Salesforce | Phase 6 — User Interface Development

orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070gL0000069EolQAU/view

Search Setup

Setup Home Object Manager

Q repo

Feature Settings

- Analytics
 - Reports & Dashboards
 - Access Policies
 - Historical Trending
 - Report Types
 - Reporting Snapshots
 - Reports and Dashboards Settings
- Security
 - Guest User Sharing Rule Access
 - Report

Didn't find what you're looking for? Try using Global Search.

Details

Display La... Blood Inventories

API Name Blood_Inventories

Description Consists data about Blood Requirement

Created By Jyotsna Sakinala, 9/27/25, 3:01 AM

Store in C... other

Deployme... Deployed

Modified By Jyotsna Sakinala, 9/27/25, 3:01 AM

Object Relationships

Blood Inventories (A)

A

↓

A

Activate Windows
Go to Settings to activate Windows.

Fields

Source Object	Included Fields
Blood Inventories	12

Type here to search

23°C

ENG

04:45

27-09-2025

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orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070gL0000069GbZQAU/view

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Details

Display La... Blood Requests

API Name Blood_Requests

Description It shows the requirement of blood

Created By Jyotsna Sakinala, 9/27/25, 3:06 AM

Store in C... other

Deployme... Deployed

Modified By Jyotsna Sakinala, 9/27/25, 3:06 AM

Object Relationships

Blood Requests (A)

A

↓

A

Activate Windows
Go to Settings to activate Windows.

Fields

Source Object	Included Fields
Blood Requests	19

Type here to search

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ENG

04:45

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3. Dashboards

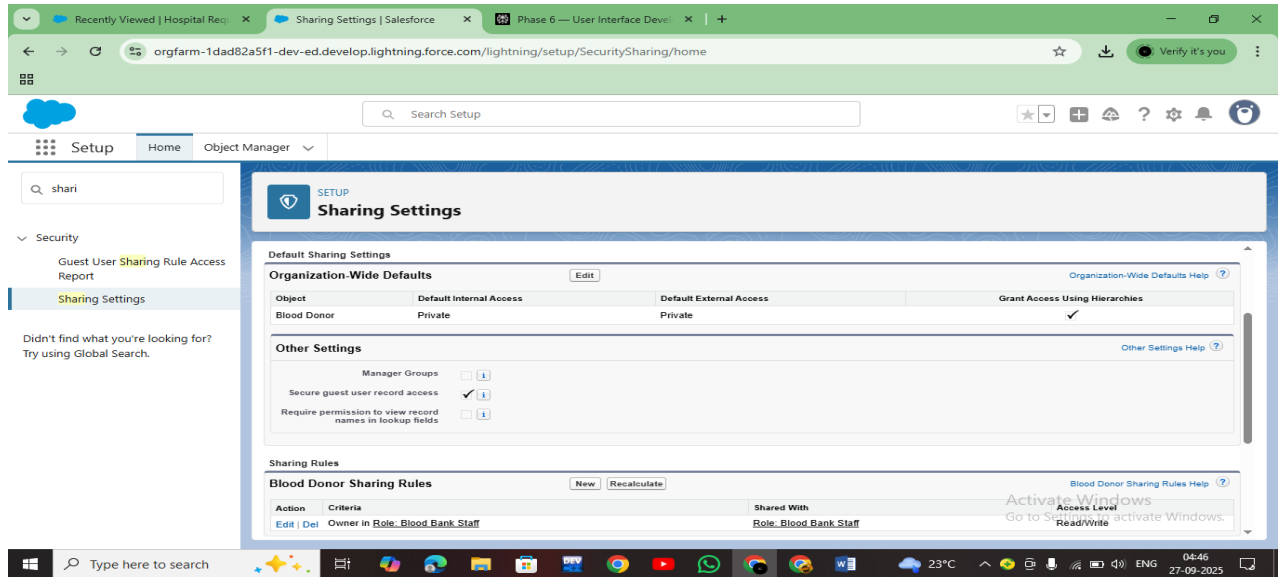
- Developed dashboards consolidating key metrics:
 - Donor counts
 - Blood request statuses
 - Blood inventory levels
- Used charts, gauges, and metrics for visual insights suited to user roles.
- Enabled real-time monitoring of blood donation operations.

4. Dynamic Dashboards

- Customized dashboards based on logged-in user's access.
- Eliminated need for multiple dashboards per role, simplifying maintenance.

5. Sharing Settings

- Configured restricted access for sensitive objects (Blood Donor, Blood Request, Hospital Request).
- Set organization-wide defaults to private, with sharing rules and role hierarchies ensuring governed access.
- Ensured compliance and minimized unnecessary data exposure.



6. Field Level Security

- Restricted visibility and edit access on sensitive fields like donor contact and health status.
- Aligned profiles and permission sets to data visibility based on user roles.

7. Session Settings

- Configured session timeout, login IP restrictions, and other session policies.
- Ensured timely session expiration to reduce unauthorized access risk.

8. Audit Trail

- Enabled audit log tracking for key data and metadata changes.
- Implemented periodic audit log reviews for detecting unauthorized or accidental changes.
- Improved overall accountability for sensitive Blood Donation System data.