# Phase 9: Reporting, Dashboards & Security

## Review

This phase focused on creating reports, dashboards, and implementing security settings in Salesforce for the **Patient Records and Treatment Tracking System**.

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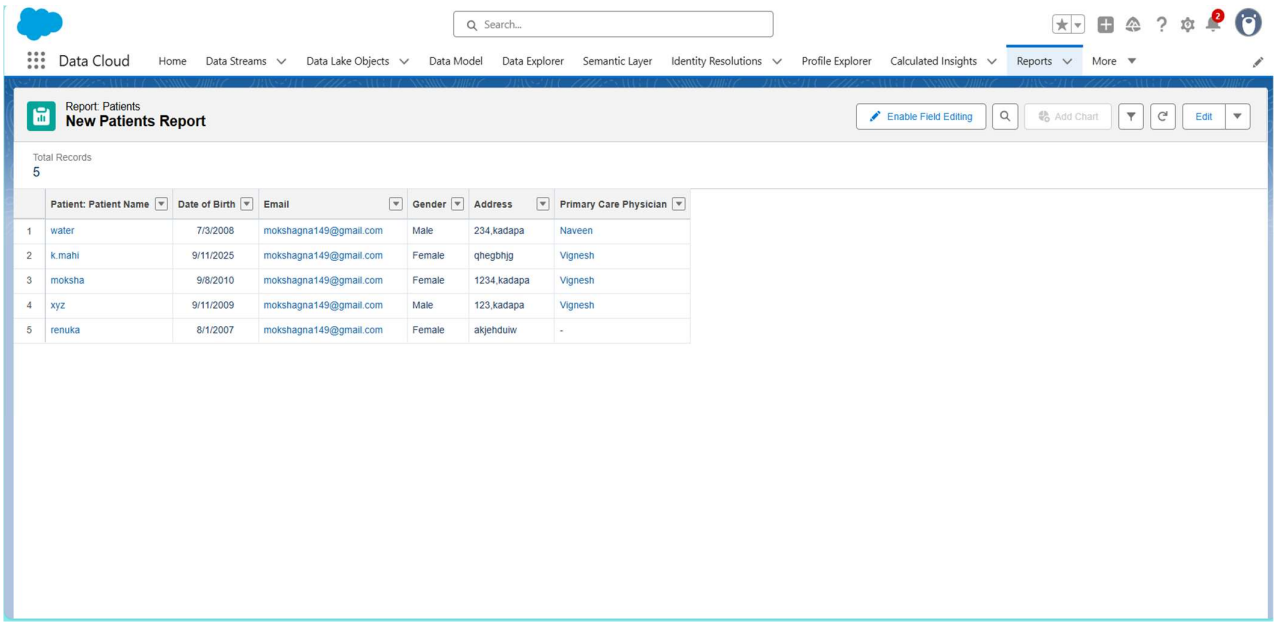
## 1. Reports

Reports were created to track and analyze patients, treatment plans, and visits.

### Tabular Report:

- **Steps:**
    1. Setup → Reports → New Report
    2. Select Object: **Patients**
    3. Add Columns & Filters (e.g., Patient Name, Date of Birth, Status)
    4. Save & Run
- **Use:** Provides a simple list view of records, such as all active patients or scheduled visits.

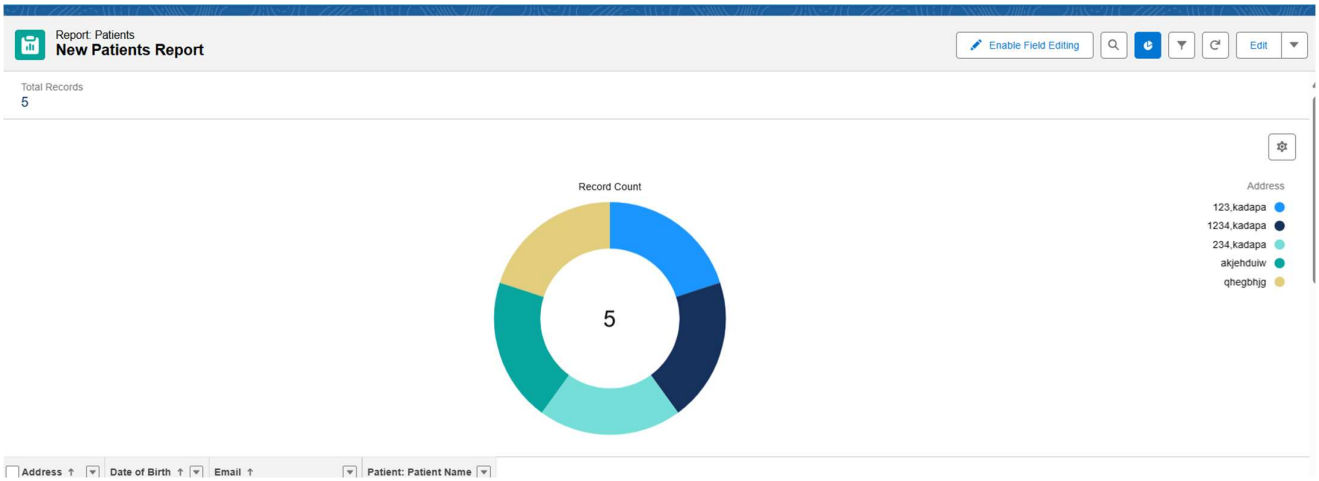



### Summary Report:

- **Steps:**
    1. Setup → Reports → New Report
    2. Add Grouping (e.g., Gender, Treatment Status)
    3. Add Summary Fields (e.g., Count of Patients)
    4. Save & Run

- **Use:** Summarizes patients based on specific criteria like treatment stage or doctor assigned.

**Outcome:**
Reports help in monitoring patient status, treatment progress, and appointments efficiently.

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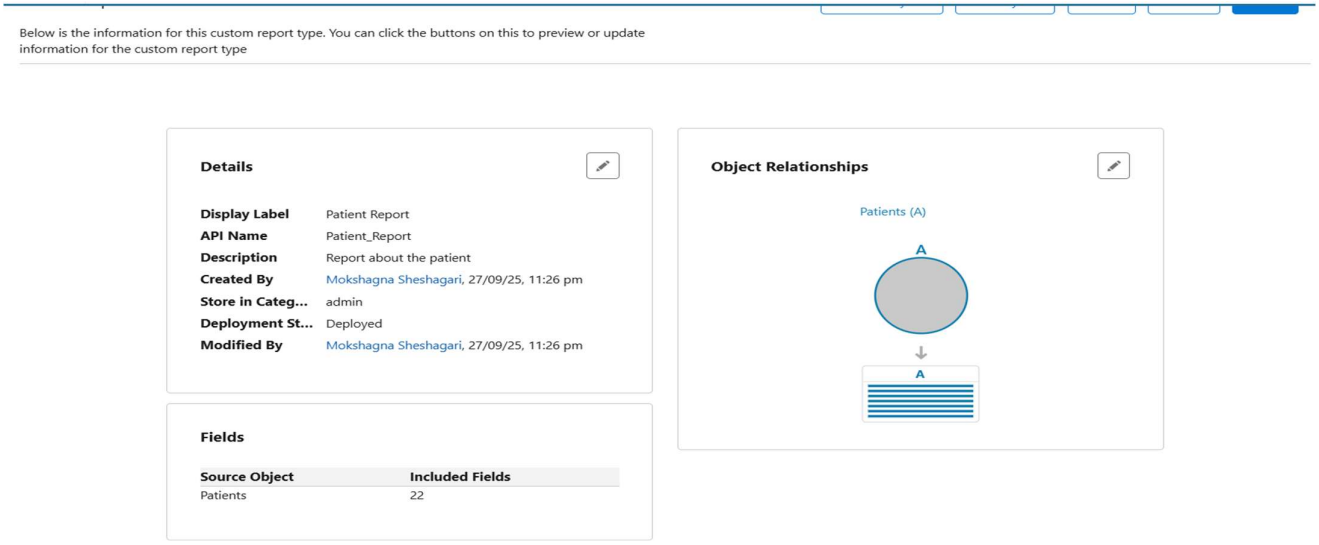
## 2. Report Types

Custom report types were created to combine data from multiple objects.

- **Steps:**
    1. Setup → Report Types → New Custom Report Type
    2. Select Primary Object: **Patient**
    3. Add Related Object: **Treatment Plan** or **Visits**
    4. Deploy → Save

**Outcome:**
Enabled cross-object reporting, e.g., **Patients linked with their Treatment Plans or Visits**, allowing better monitoring of care delivery.

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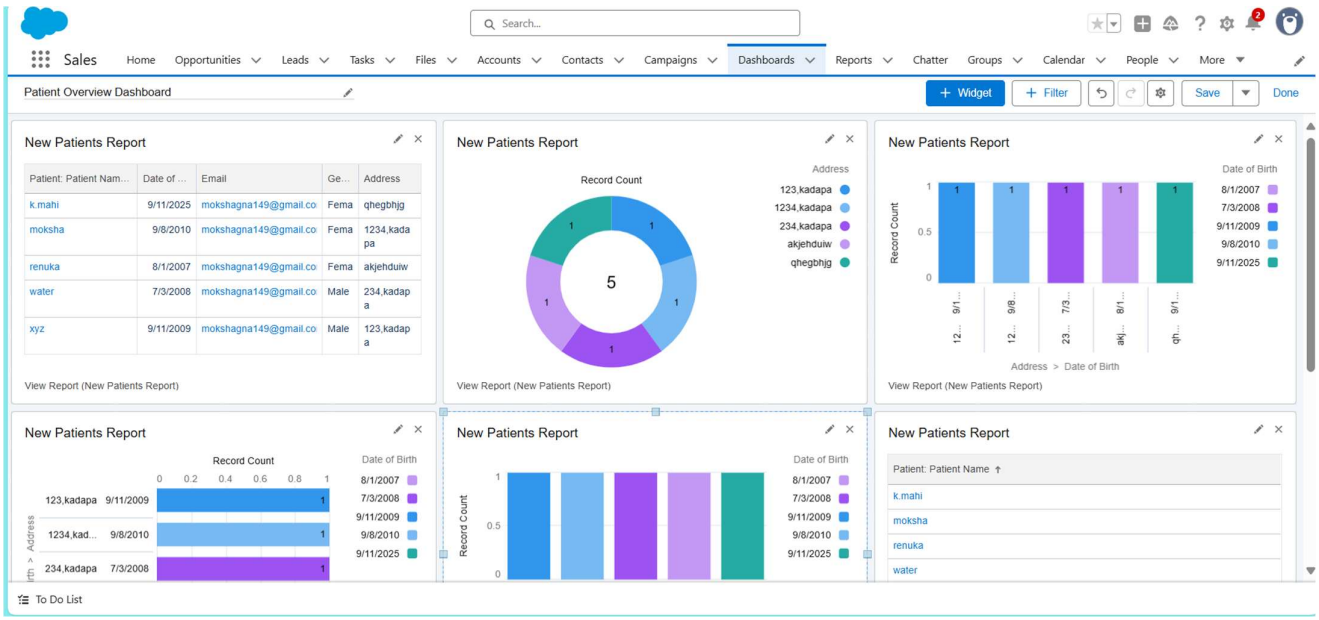
## 3. Dashboards

Dashboards were created to provide a visual overview of system data.

- **Steps:**
    1. Setup → Dashboards → New Dashboard
    2. Add Components → Choose Source Report
    3. Select Chart Type (e.g., Bar, Pie, Line)
    4. Save

**Outcome:**
Graphical view of patient distribution by treatment status, upcoming appointments, and completed treatments.

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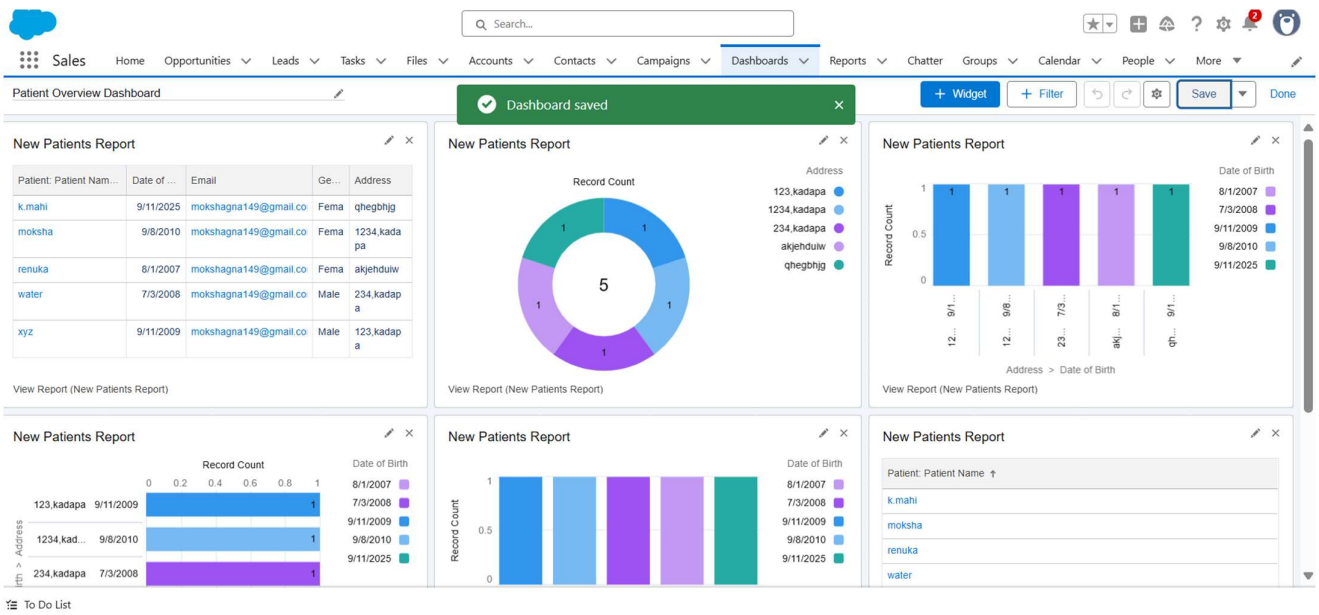
## 4. Dynamic Dashboards

Dynamic dashboards were enabled to show data according to the logged-in user.

- **Steps:**
    1. Edit Dashboard → View Dashboard As → Run as Logged-in User
    2. Save

**Outcome:**
Each coordinator or staff member sees only the data relevant to their role, improving personalized insights and data security.

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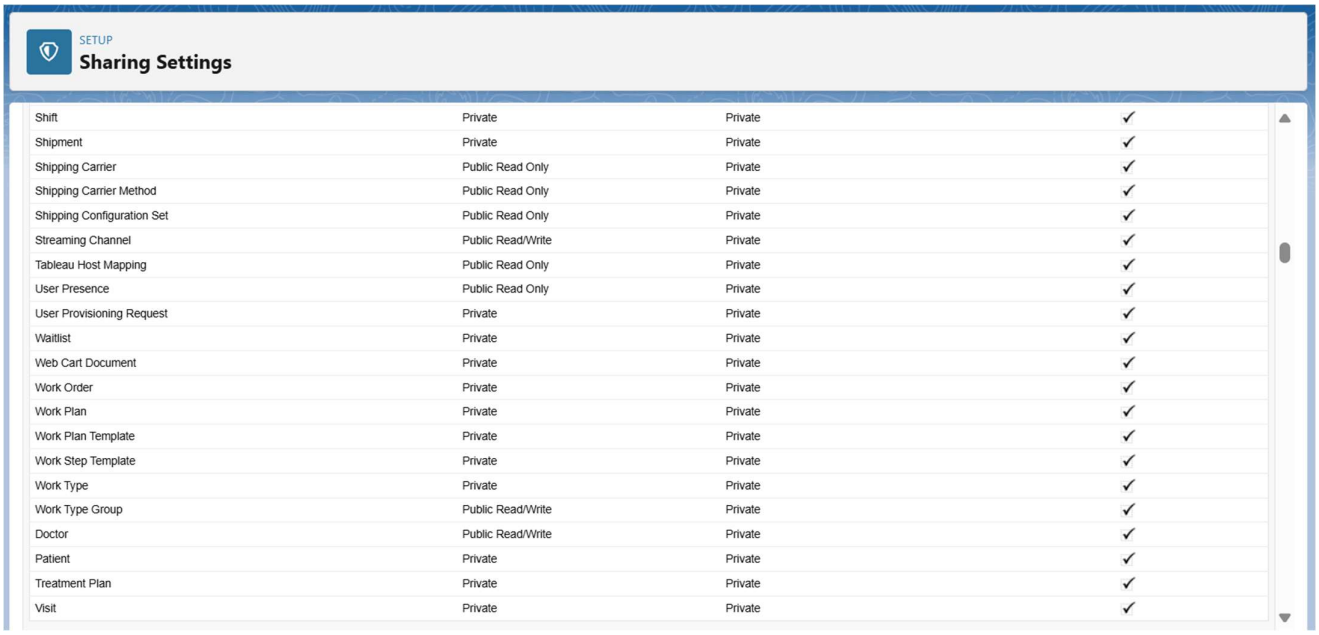
## 5. Sharing Settings

Sharing rules and Organization-Wide Defaults (OWD) were configured to manage record access.

- **Steps:**
    1. Setup → Sharing Settings → Configure OWD for each object
    2. Add Sharing Rules → Save

**Outcome:**
Controlled data access while allowing collaboration among healthcare staff.




| | | | |
|---|---|---|---|
| Shift | Private | Private | ✓ |
| Shipment | Private | Private | ✓ |
| Shipping Carrier | Public Read Only | Private | ✓ |
| Shipping Carrier Method | Public Read Only | Private | ✓ |
| Shipping Configuration Set | Public Read Only | Private | ✓ |
| Streaming Channel | Public Read/Write | Private | ✓ |
| Tableau Host Mapping | Public Read Only | Private | ✓ |
| User Presence | Public Read Only | Private | ✓ |
| User Provisioning Request | Private | Private | ✓ |
| Waitlist | Private | Private | ✓ |
| Web Cart Document | Private | Private | ✓ |
| Work Order | Private | Private | ✓ |
| Work Plan | Private | Private | ✓ |
| Work Plan Template | Private | Private | ✓ |
| Work Step Template | Private | Private | ✓ |
| Work Type | Private | Private | ✓ |
| Work Type Group | Public Read/Write | Private | ✓ |
| Doctor | Public Read/Write | Private | ✓ |
| Patient | Private | Private | ✓ |
| Treatment Plan | Private | Private | ✓ |
| Visit | Private | Private | ✓ |

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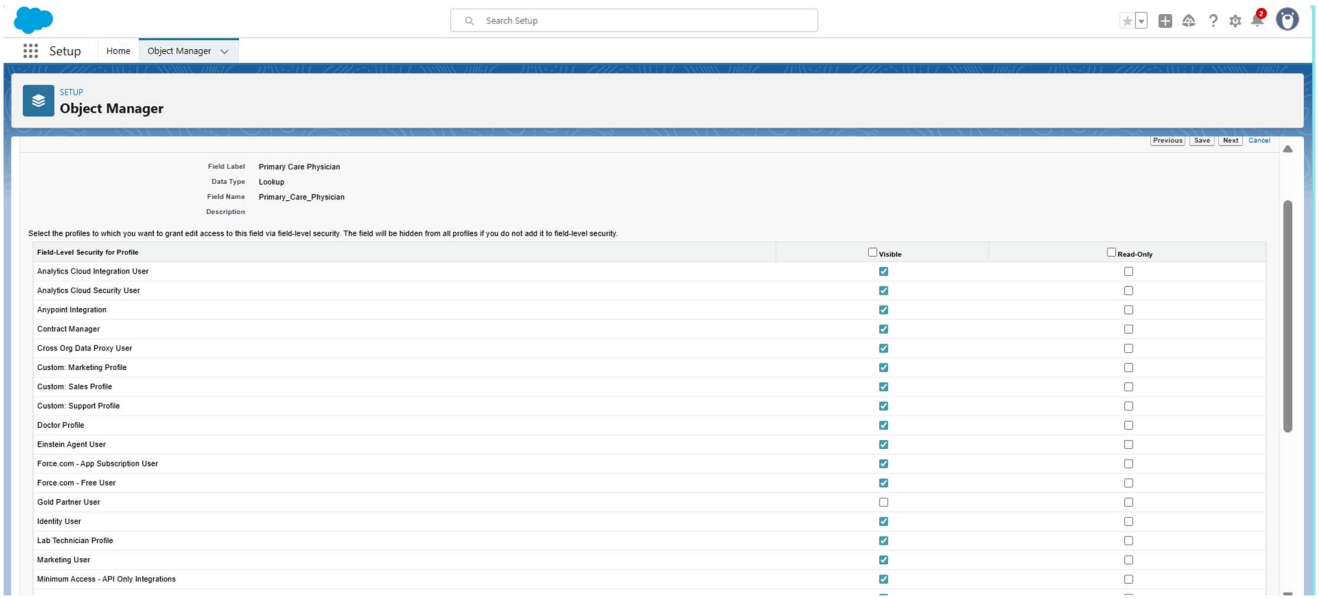
## 6. Field-Level Security

Field visibility was controlled for different profiles.

- **Steps:**
    1. Setup → Object Manager → Select Object → Fields & Relationships
    2. Select Field → Set Field-Level Security → Save

**Outcome:**
Restricted sensitive fields (like patient contact details or medical history) to authorized users only.

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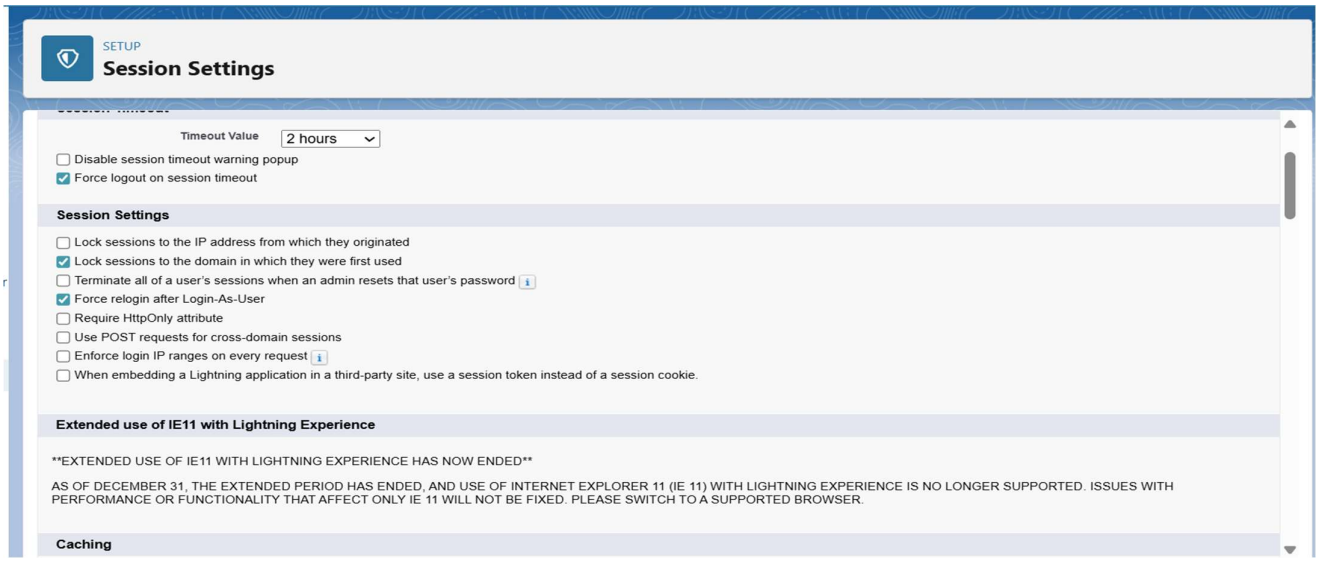
# 7. Session Settings

Session security policies were applied to enhance system security.

- **Steps:**
    1. Setup → Session Settings
    2. Configure Session Timeout, Security Levels → Save

**Outcome:**
Prevents unauthorized access and ensures secure session handling.

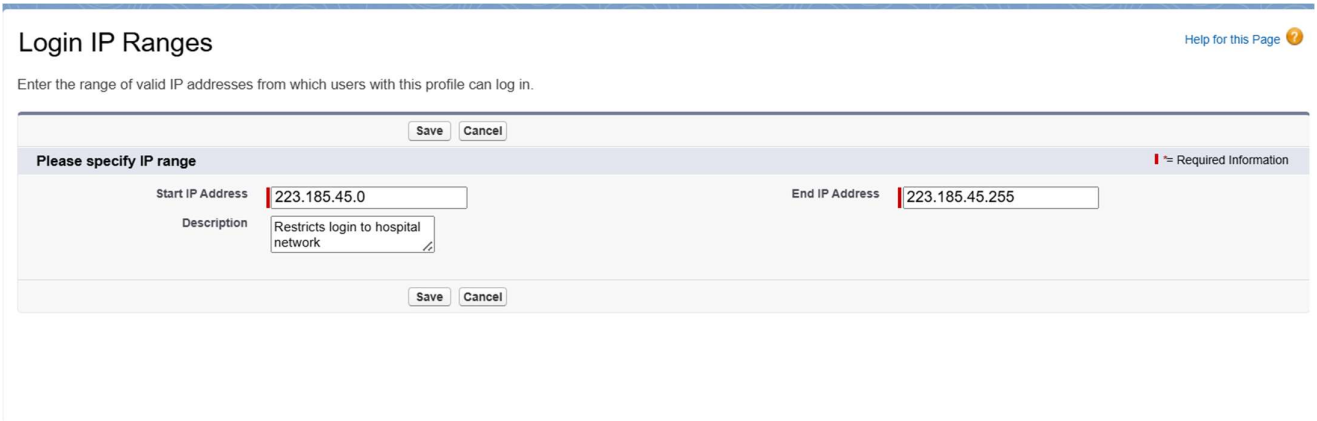


## 8. Login IP Ranges

Login IP ranges were set to restrict access to trusted networks.

- **Steps:**
    1. Setup → Profiles → Select Profile → Login IP Ranges
    2. Add New Range → Save

**Outcome:**
Restricted users from logging in outside the defined IP ranges, improving system security.

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## Overall Result

- Reports & dashboards provide clear visibility of patient status, treatment plans, and visits.
- Dynamic dashboards allow role-based insights.
- Security settings (Sharing, FLS, Session, IP Ranges) ensure data protection and controlled access.