

Phase 9: Reporting, Dashboards & Security Review

Goal: Track student applications and mentorship outcomes using reports and dashboards. Ensure secure access through sharing settings, field-level security, and login restrictions. Maintain accountability with audit trails and session controls.

1. Reports

- Used to analyse student, mentor, and application data.
- In the project:
- Student Applications Report – shows how many applications each student has submitted and their statuses (In Progress, Submitted, Accepted, Rejected).
- Mentorship Sessions Report – tracks the number of mentorship sessions conducted by each mentor to evaluate engagement.

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Student Success HubApplication Dashboard FormStudent PageStudentsApplicationsMentorship SessionsContactsReportsHome PageMore

Report: Applications

Student Applications Report

Enable Field Editing

Q

Add Chart

Edit

Total Records

17

	Student	Application: Application Name	End Date	Start Date	Submission ...	Status
1	-	AP-0019	-	-	9/25/2025	Approved
2	Harsh Bhawe	AP-0006	9/4/2025	9/1/2025	9/24/2025	Approved
3	Jara Yadav	AP-0012	9/3/2025	9/1/2025	9/1/2025	Rejected
4	Jara Yadav	AP-0011	9/3/2025	9/1/2025	9/1/2025	Approved
5	Jara Yadav	AP-0007	9/3/2025	9/1/2025	9/2/2025	Approved
6	-	AP-0018	9/4/2025	9/1/2025	9/17/2025	Approved
7	-	AP-0016	9/11/2025	9/1/2025	9/25/2025	Under Review
8	-	AP-0015	9/3/2025	9/1/2025	9/4/2025	Rejected
9	-	AP-0017	9/3/2025	9/1/2025	9/24/2025	Approved
10	Harsh Bhawe	AP-0003	9/16/2025	9/2/2025	9/24/2025	Approved
11	Shyam Sharma	AP-0004	10/2/2025	9/2/2025	9/2/2025	Under Review

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Student Success HubApplication Dashboard FormStudent PageStudentsApplicationsMentorship SessionsContactsReportsHome PageMore

Report: Mentorship Sessions

Mentorship Sessions Report

Enable Field Editing

Q

Add Chart

Edit

Total Records

4

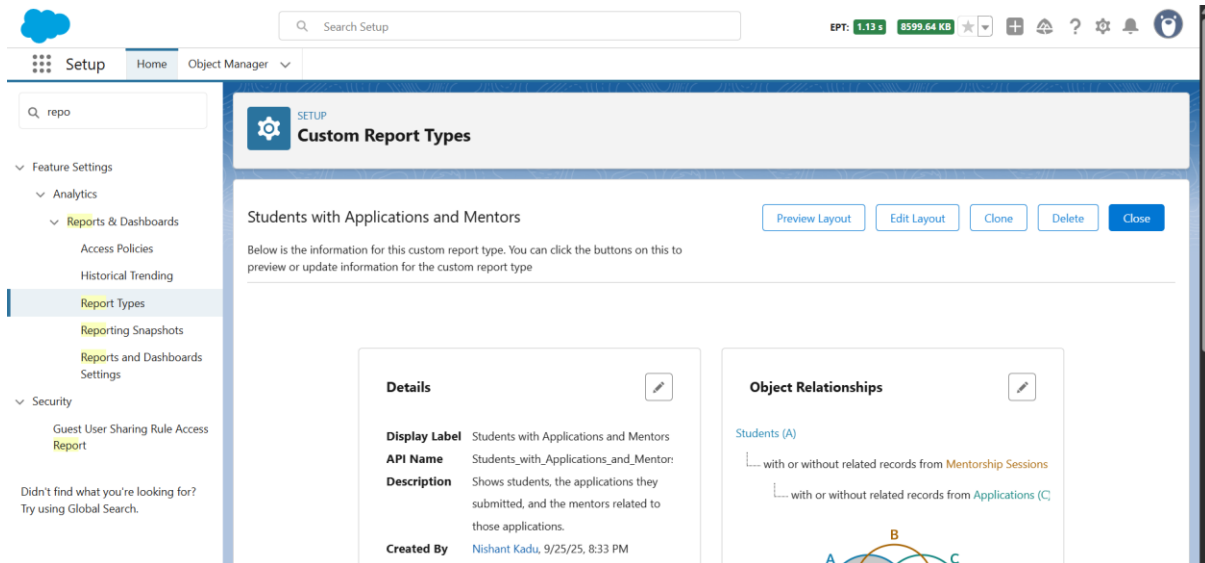
Total Duration

15

	Mentorship Session: Session Number	Assigned Mentor	Student	Status	Duration
1	SES-0002	-	Shyam Sharma	Scheduled	1
2	SES-0003	-	Shyam Sharma	Scheduled	1
3	SES-0004	Jara Yadav	Tara Yadav	Scheduled	1
4	SES-0001	Rakesh Kumar	-	-	12
5					15

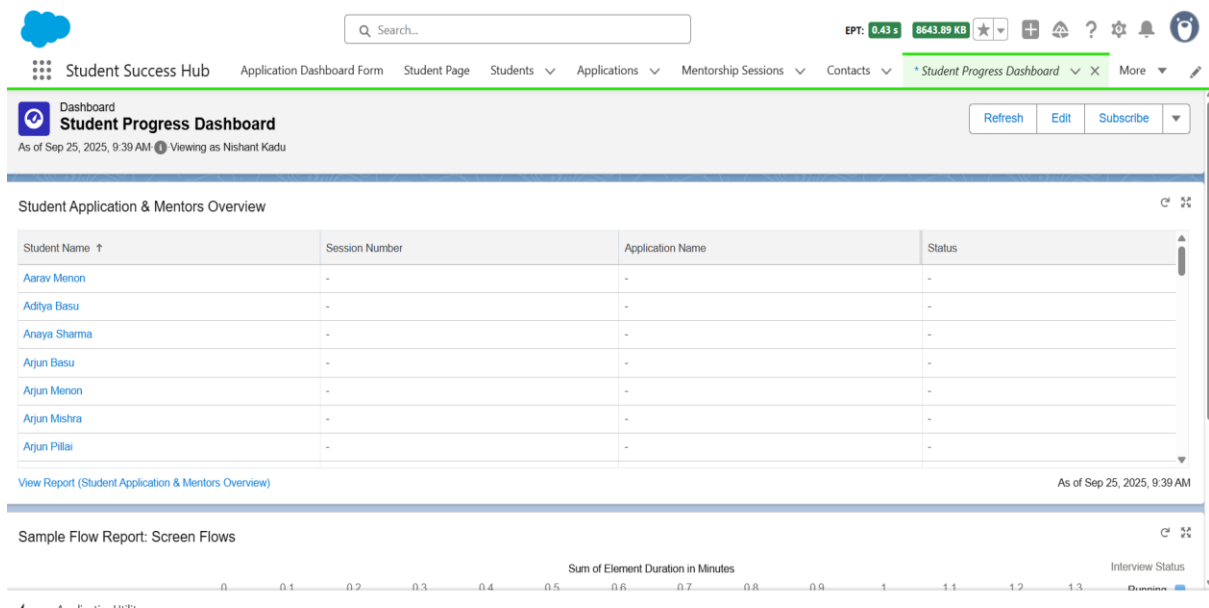
2. Report Types

- Define the combinations of objects available for reporting.
- In the project:
- A Custom Report Type (Student + Application + Mentor) was created.
- Enabled advanced analysis like “Applications guided by each Mentor” or “Student progress linked to mentorship.”



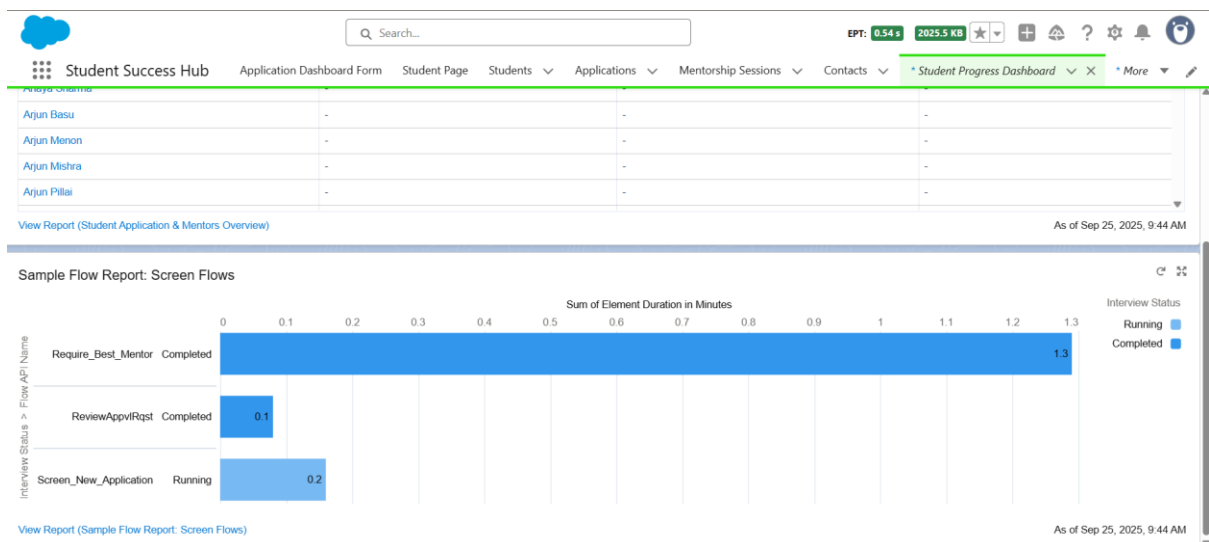
3. Dashboards

- Visual displays of multiple reports for quick insights.
- In the project:
- Student Progress Dashboard – shows % of applications Accepted, Rejected, or In Progress.
- Mentor Performance Dashboard – displays sessions conducted, feedback scores, and outcomes per mentor.



4. Dynamic Dashboards

- Dashboards that display data according to the logged-in user.
- In the project:
- Each Mentor sees only their own assigned students and mentorship data.
- Admins can see all student and mentor data.



5. Sharing Settings

- Control record-level access across users.
- In the project:
- Applications → set to *Private* (only the student, mentor, and admin can view).

- Students & Mentors → set to Public Read Only (basic details visible but edits restricted).

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Sharing Settings' and includes sections for 'Secure guest user record access', 'Require permission to view record names in lookup fields', 'Sharing Rules', 'Sharing Overrides', and 'Profiles That Override Application Sharing'. The 'Sharing Rules' section shows a table with columns for 'Action', 'Criteria', 'Shared With', and 'Access Level'. The 'Profiles That Override Application Sharing' section shows a table with columns for 'Profile', 'Custom Profile', 'Organization-Wide Permissions', and 'Application Permissions'.

Profile	Custom Profile	Organization-Wide Permissions	Application Permissions
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manager Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
cloud_user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

6. Field Level Security

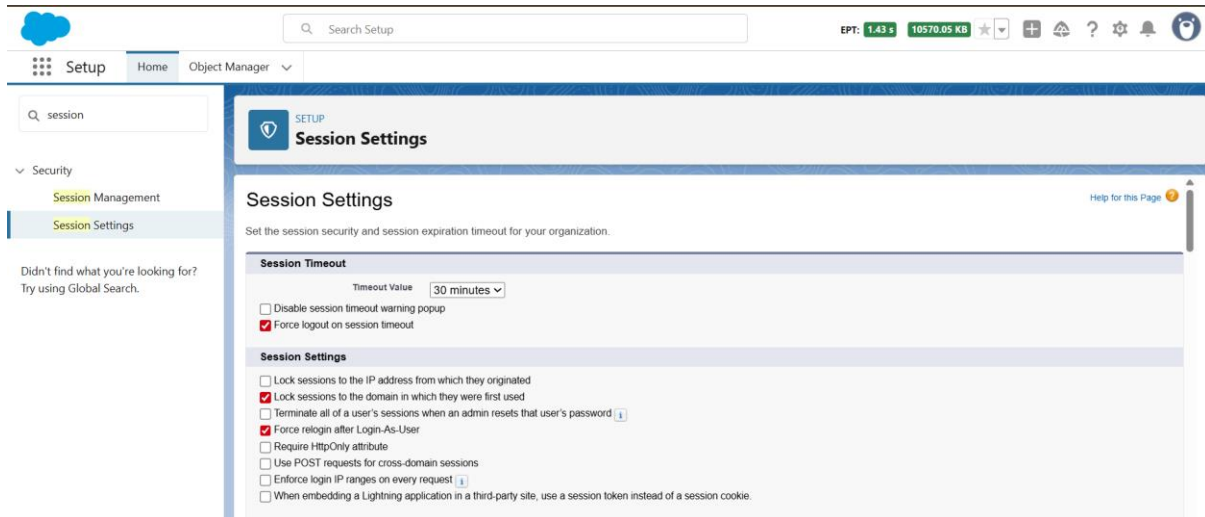
- Restrict sensitive fields to certain profiles.
- In the project:
- Fields like Student ID Proof and personal contact details are hidden from Mentors.
- These fields are only visible to Admins.

The screenshot shows the Salesforce Setup interface with the 'Field-Level Security' page selected. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Field-Level Security' and includes a table with columns for 'Field Label', 'Data Type', 'Visible', and 'Read-Only'. The table lists various profiles and their corresponding field-level security settings for the 'StudentId' field.

Field Label	Data Type	Visible	Read-Only
StudentId	Text(50) (Unique Case Insensitive)		
Field-Level Security for Profile			
Analytics Cloud Integration User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration		<input checked="" type="checkbox"/>	<input type="checkbox"/>
cloud_user		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>

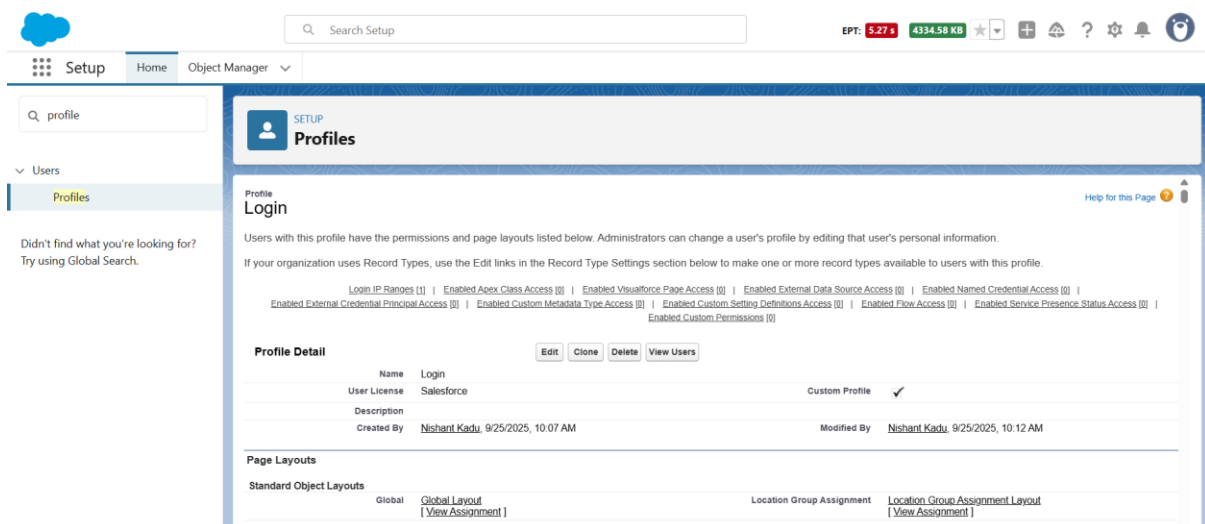
7. Session Settings

- Manage session timeout to prevent unauthorised access.
- In the project:
- Configured session timeout to 30 minutes.



8. Login IP Ranges


- Restrict logins to specified IP addresses for enhanced security.
- In the project:
- Mentor and Admin profiles restricted to institution/office IP ranges.



9. Audit Trail

- Provides visibility into setup and configuration changes.

- In the project:
- Used to track who created, updated, or deleted records (Applications, Mentorship Sessions, etc.).
- Ensures accountability for sensitive data changes.



Setup

Home

Object Manager

Search Setup

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view set

Feature Settings

Sales

Contact Intelligence [View Setup](#)

Lead Intelligence [View Setup](#)

Security

[View Setup Audit Trail](#)

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SETUP

View Setup Audit Trail

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 10:12:41 AM PDT	kadu.nishant1234316@agentforce.com		Changed profile Login. Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/25/2025, 10:12:05 AM PDT	kadu.nishant1234316@agentforce.com		Added Login Ip Range to Login from 203.0.113.25 to 203.0.113.25	Manage Users	
9/25/2025, 10:07:17 AM PDT	kadu.nishant1234316@agentforce.com		Created profile Login: Cloned from profile Mentor Profile	Manage Users	
9/25/2025, 10:02:44 AM PDT	kadu.nishant1234316@agentforce.com		Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/25/2025, 10:02:44 AM PDT	kadu.nishant1234316@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/25/2025, 10:02:44 AM PDT	kadu.nishant1234316@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/25/2025, 10:02:44 AM PDT	kadu.nishant1234316@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	