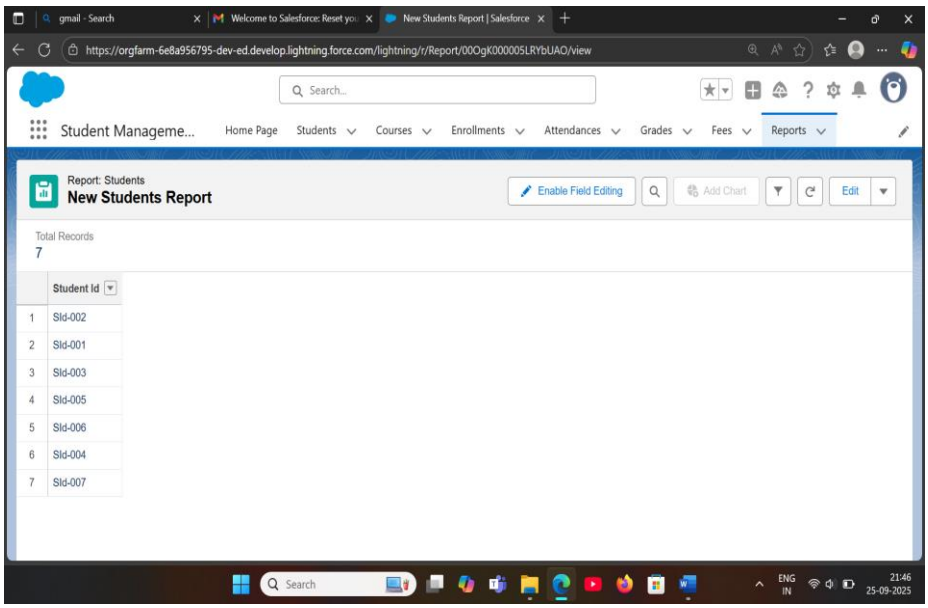
Phase 9: Reporting, Dashboards & Security Review

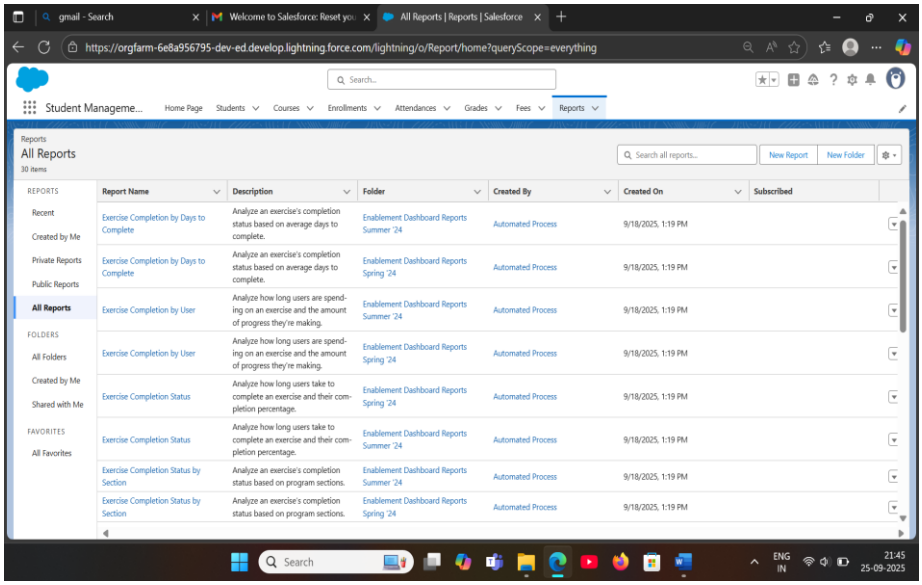
Goal :

Deliver **powerful reporting & analytics** (Reports, Dashboards, Dynamic Dashboards) and implement **robust security controls** (Sharing Settings, Field-Level Security, Session Settings, IP Ranges, Audit Trail) to ensure data is both actionable and protected.

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

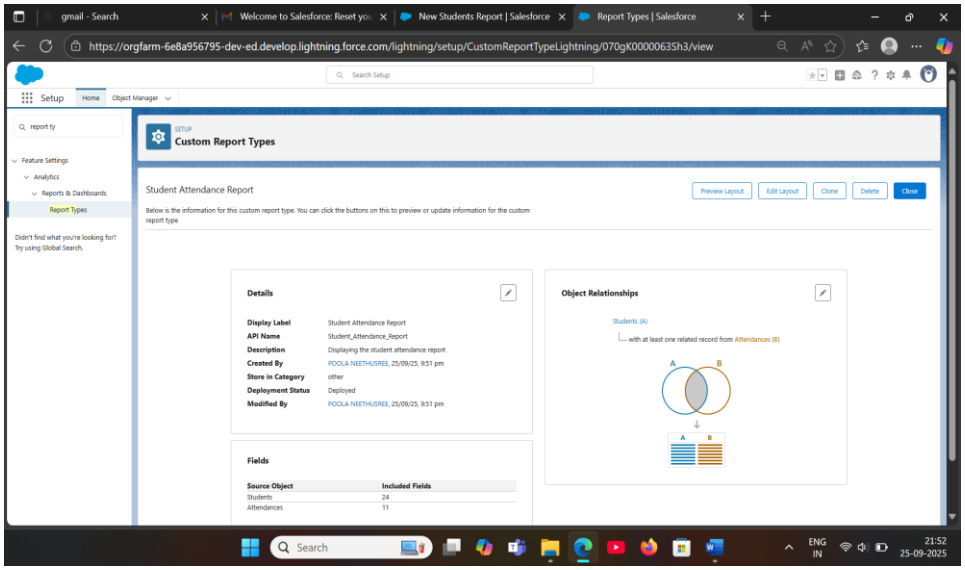
- **Tabular Reports:**
    - Student List Report (Basic student details)
    - Attendance List Report (Daily/Monthly attendance)
- **Summary Reports:**
    - Class-wise Student Count
    - Attendance Percentage by Class
    - Grade Distribution Summary
- **Matrix Reports:**
    - Attendance Matrix (Rows = Classes, Columns = Months)
    - Grade Performance Matrix (Rows = Subjects, Columns = Terms)
- **Joined Reports:**
    - Student + Attendance + Grades combined view for holistic performance analysis
    - Course Enrollment + Completion Rate joined report





2. Report Types

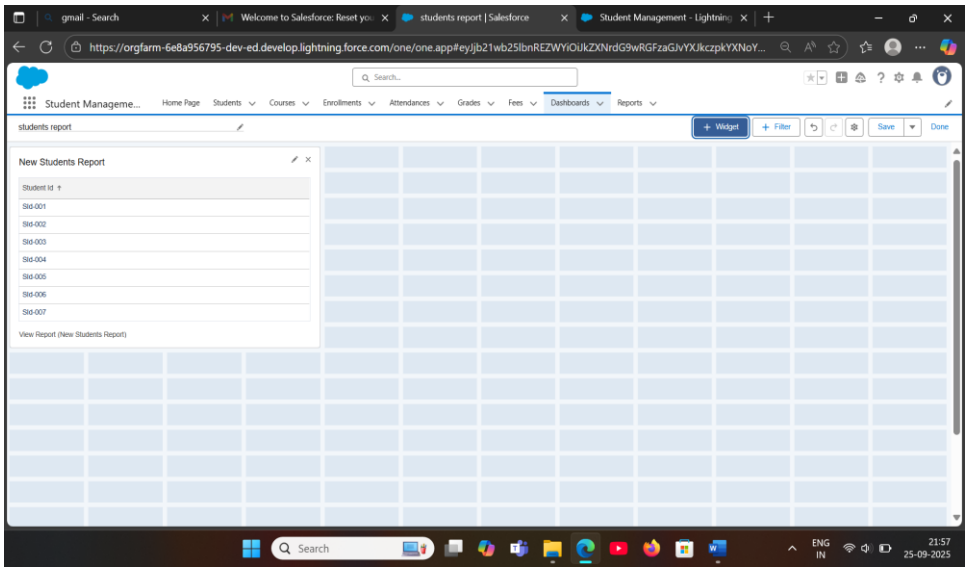
- **Student Report Type:** Includes student personal details, contact info
- **Attendance Report Type:** Links Student → Attendance records
- **Grades Report Type:** Links Student → Grades with term/subject info
- **Courses Report Type:** Links Student → Courses enrolled, status, teacher details



3. Dashboards

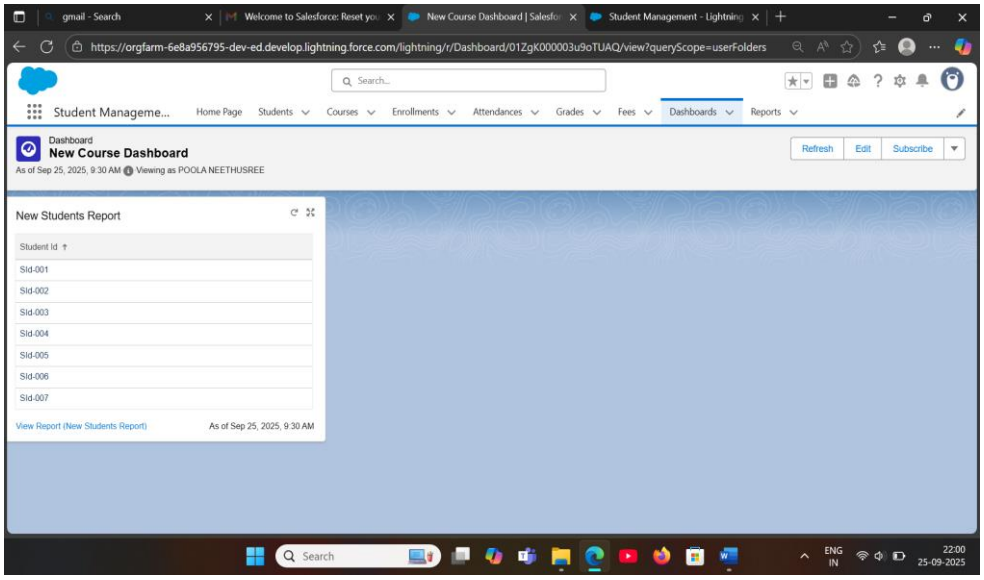
- **Student Overview Dashboard:** Total Students, New Admissions, Dropouts
- **Attendance Dashboard:** Present %, Absent %, Class-wise charts
- **Grades Dashboard:** Average Grades per Class, Top Performers, At-Risk Students

- **Course Dashboard:** Enrolment Trends, Most Popular Courses



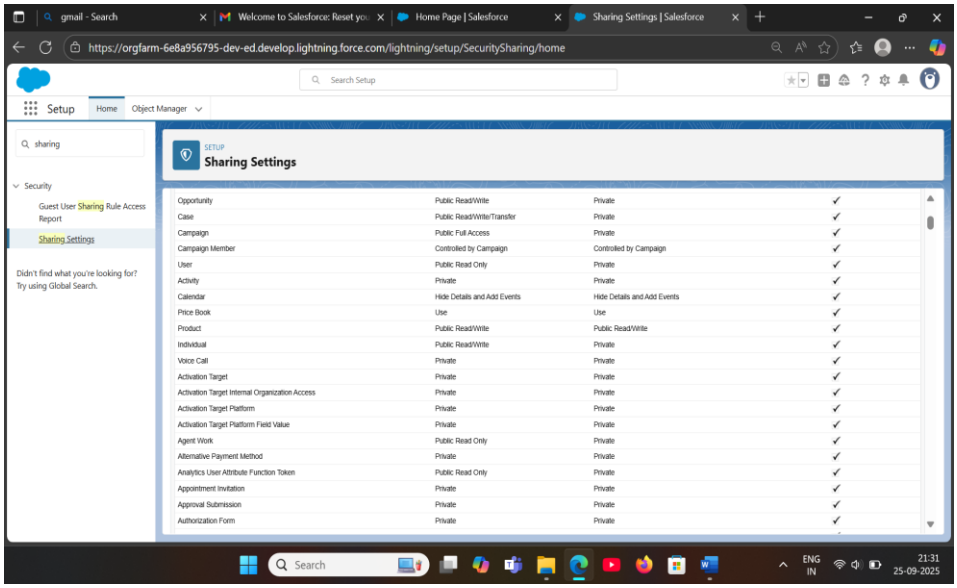
4. Dynamic Dashboards

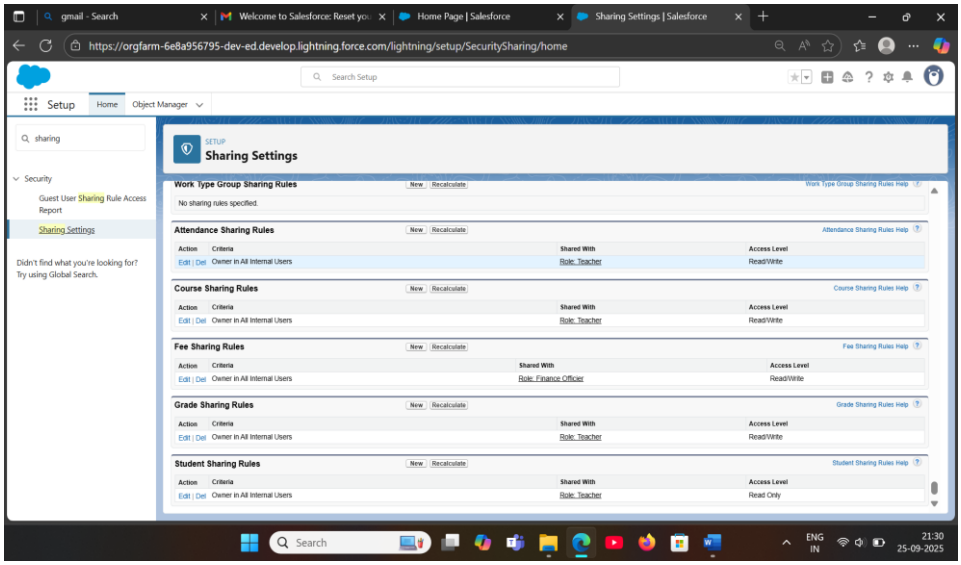
- Configured dashboards to **run as logged-in user** so each Teacher sees only their class data, Principal sees their school data, and Admin sees all data.
- Applied **dashboard filters** (Class, Term, Subject) for real-time drill-down.



5. Sharing Settings

- **Organization-Wide Defaults (OWD):**
  - Students, Attendance, Grades = Private
  - Courses = Controlled by Parent





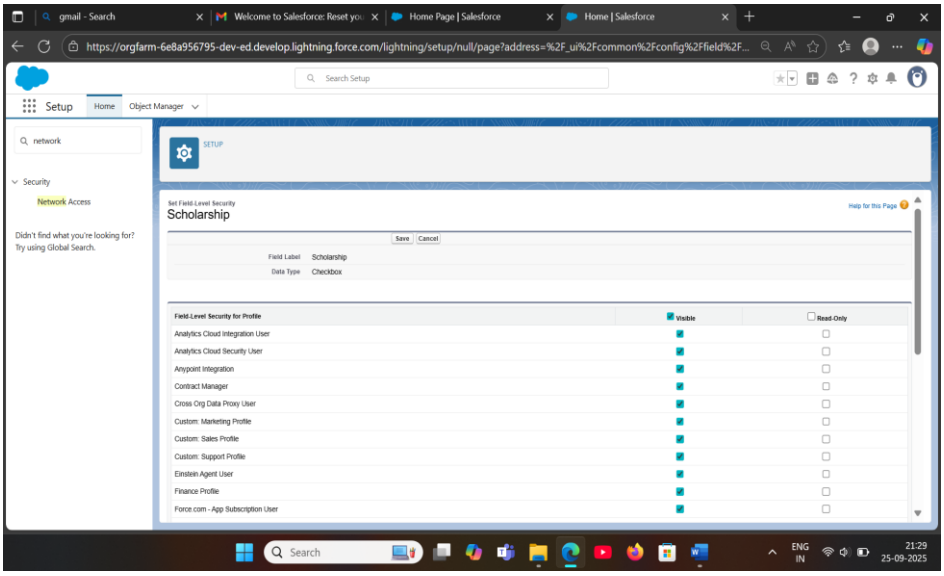
- **Role Hierarchy:**
  - Admin > Principal > Teacher > Student
- **Sharing Rules:**
  - Criteria-based rules to share records with Teacher Groups based on Class/Section
  - Owner-based sharing for Principals to access all data under their school

6. Field-Level Security

- **Sensitive Fields Restricted:**
  - SSN, Parent Contact Info → Visible to Admin & Principal only
  - Fee Details → Visible to Admin only

- Grades → Read-Only for Teachers, Visible to Principal/Admin

- **Profiles Configured:** Admin, Principal, Teacher, Student with tailored field visibility

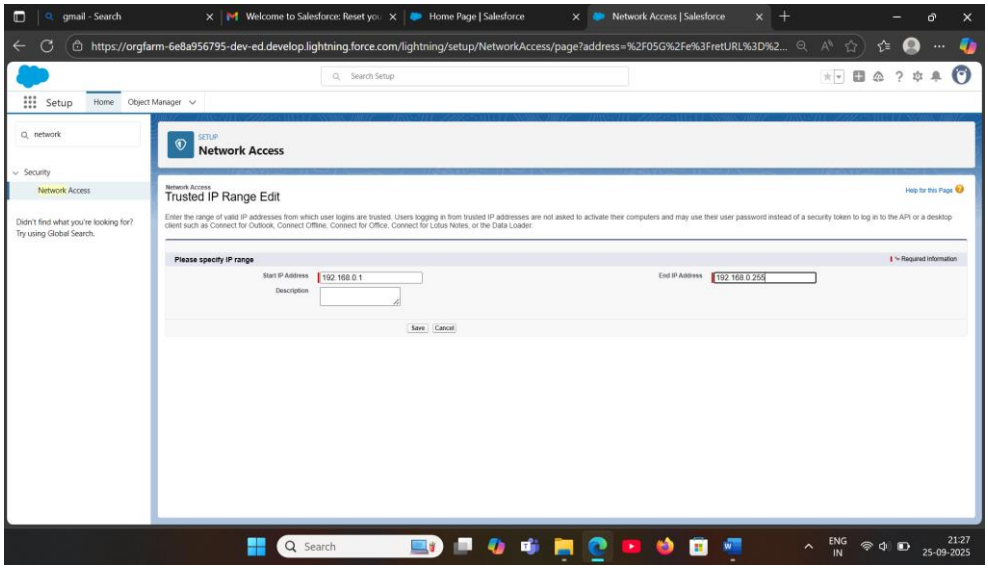


7. Session Settings

- **Session Timeout:** 30 minutes
- **Logout on Timeout:** Enabled
- **Lock Session to IP/Domain:** Enabled
- **Clickjack & CSRF Protection:** Enabled
- **HTTPS Required:** Enforced for secure communication

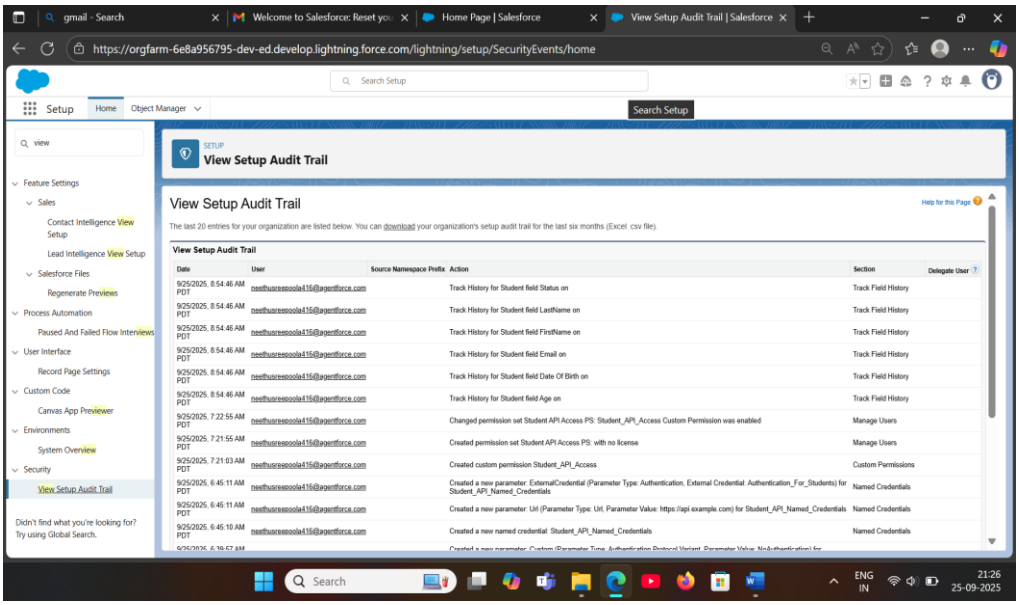
8. Login IP Ranges

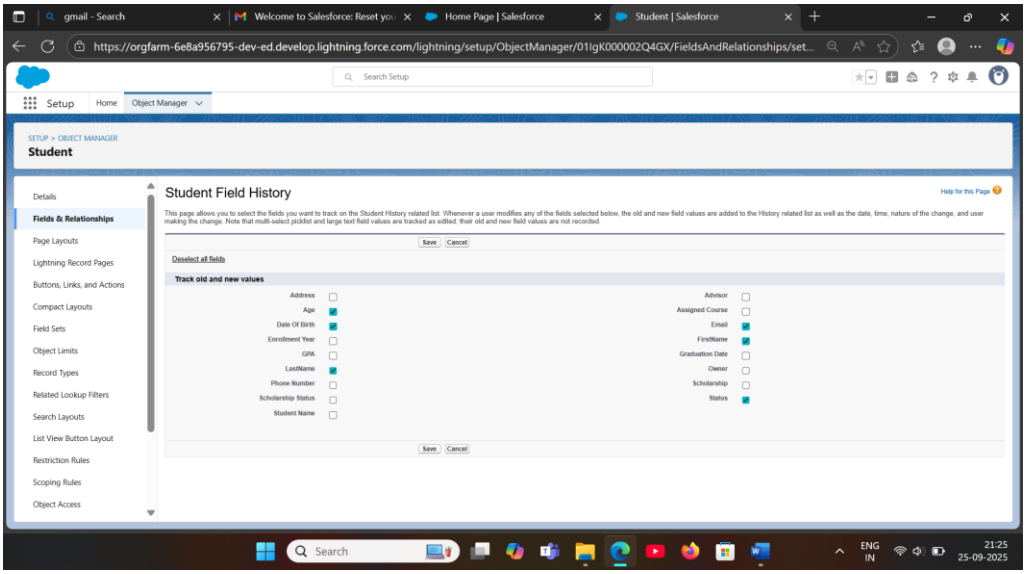
- **Network Access (Org-Wide):** Added school's LAN/Wi-Fi IP range
- **Profile-Specific Ranges:**
  - Teachers: Allowed only from school network
  - Admin: Allowed from office network + VPN
  - Students: Allowed from broader IP range (school + home if needed)



9. Audit Trail

- **Setup Audit Trail:** Enabled and reviewed for changes in roles, profiles, and settings
- **Field History Tracking:**
    - Tracked Fields: Student Status, Assigned Teacher, Grade Changes, Attendance Updates
- **Login History:** Monitored failed logins and suspicious attempts

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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Student Field History
Help for this Page
This page allows you to select the fields you want to track on the Student History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited, their old and new field values are not recorded.
Save
Cancel
Deselect all fields
Track old and new values
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Age
Date Of Birth
Enrollment Year
GPA
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Scholarship Status
Student Name
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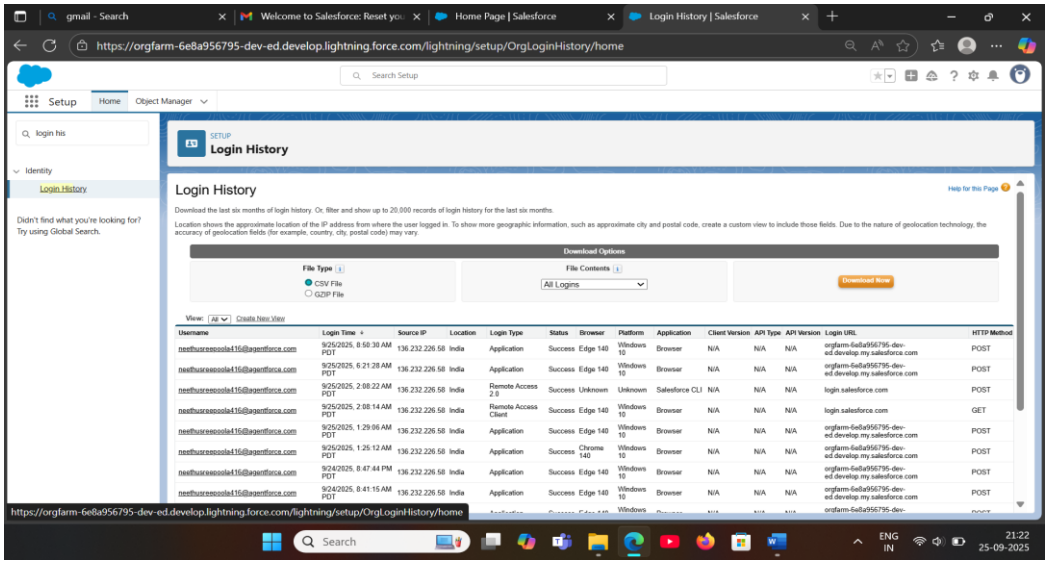
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Login History
Login History
Help for this Page
Download the last six months of login history. Or, filter and show up to 20,000 records of login history for the last six months.
Location shows the approximate location of the IP address from where the user logged in. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.
Download Options
File Type
CSV File
GZIP File
File Contents
All Logins
Download Now
View: All
Create New View
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