

Phase 9: Reporting, Dashboards & Security Review

A. Reports

1. Tabular Reports

Purpose: To display a simple list of records without groupings — ideal for direct exports or audits.

Implementation:

- **Report Type:** *Patents*
 - **Report Name:** *All Patent Records*
 - **Columns:** Patent Name, Owner, Status, Filing Date, Expiry Date, Days Until Expiry, Patent Type.
 - **Filter Criteria:** *Status != 'Expired'*
 - **Outcome:** Provides a quick flat-view list of all active patents for the legal team.
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2. Summary Reports

Purpose: To group data and provide totals or averages.

Implementation:

- **Report Type:** *Patents*
- **Report Name:** *Patents by Type and Status*
- **Group Rows By:** Patent Type
- **Group Columns By:** Status

- **Add Formula Field:** `COUNT(Patent ID)` to display total patents per type.
 - **Outcome:** Enables quick visualization of how many patents are active, expired, or pending within each type.
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3. Matrix Reports

Purpose: To analyze data in a grid-like structure with both row and column groupings.

Implementation:

- **Report Type:** `Patents`
 - **Report Name:** *Patents by Country and Year of Filing*
 - **Group Rows By:** Country
 - **Group Columns By:** Filing Year (Formula from Filing Date)
 - **Show Summary:** Total Patents per Country-Year
 - **Outcome:** Provides geographical and chronological insight into filing trends.
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4. Joined Reports

Purpose: To combine multiple related datasets for comparative analysis.

Implementation:

- **Report Type:** `Patents + Inventors`
- **Report Name:** *Patents and Inventor Activity Report*
- **Blocks:**
 - Block 1 → Patents (Grouped by Status)
 - Block 2 → Inventors (Grouped by Contribution or Count)

- **Outcome:** Correlates inventor participation with patent success rates.
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B. Report Types

Custom Report Type Configuration

Purpose: To enable combined and cross-object reporting.

Setup:

- **Primary Object:** Patent__c
 - **Related Object:** Project__c or Inventor__c (based on relationships)
 - **Label:** *Patents with Associated Projects or Inventors*
 - **Store in Category:** *IP Management Reports*
 - **Outcome:** Allows deeper insight into how projects and inventors align with patent outcomes.
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C. Dashboards

1. Static Dashboards

Purpose: For management-level overviews.

Dashboard Name: *Patent Insights Dashboard*

Components:

- **Bar Chart:** Patents by Status
- **Pie Chart:** Patents by Type
- **Line Chart:** Patent Expiry Trend (Next 30 days)
- **Gauge:** Expiring Patents this Week

- **Table:** Top 5 Inventors by Patent Count
Outcome: Enables executives to monitor key patent KPIs at a glance.
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2. Dynamic Dashboards

Purpose: To allow each user to view data according to their access level.

Dashboard Name: *My Patent Overview*

Configuration:

- **Dashboard View:** Run as Logged-in User
 - **Filters:** Patent Status, Filing Date Range
 - **Outcome:** Project Managers and Inventors see only their related records, ensuring personalized visibility.
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D. Security Review

1. Sharing Settings

Purpose: To define record visibility across the organization.

Configuration:

- **Organization-Wide Default (OWD):**
 - Patent__c → *Private*
 - Project__c → *Private*
 - Inventor__c → *Controlled by Parent*
- **Sharing Rules:**
 - Share *Patents* with *Legal Team* if Project Phase = "Review"
 - Share *Projects* with *Project Managers* based on region

- **Outcome:** Data visibility restricted to relevant personnel, minimizing data leakage.
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2. Field-Level Security

Purpose: To restrict access to sensitive patent data fields.

Configuration:

- **Sensitive Fields:** Cost, Revenue, Confidential Notes
 - **Profiles Restricted:** Non-admin roles
 - **Outcome:** Prevents unauthorized users from viewing or editing confidential fields.
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3. Session Settings

Purpose: To enhance session security and prevent unauthorized access.

Configuration:

- Session Timeout: 60 minutes of inactivity
 - Enforce login IP ranges (see below)
 - Enable “Lock sessions to the IP address from which they originated”
 - **Outcome:** Reduces session hijacking risks.
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4. Login IP Ranges

Purpose: To limit logins to trusted networks only.

Configuration:

- Set IP Range: 192.168.0.0 to 192.168.255.255 (for internal corporate network)
- Apply to: System Admins and Patent Management Profiles

- **Outcome:** Ensures logins only occur from approved network locations.
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5. Audit Trail

Purpose: To monitor configuration changes for compliance.

Setup:

- Navigate to **Setup** → **Security** → **View Setup Audit Trail**
 - Export logs for the past 6 months.
 - **Outcome:** Provides traceability for admin actions related to patent data and security settings.
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