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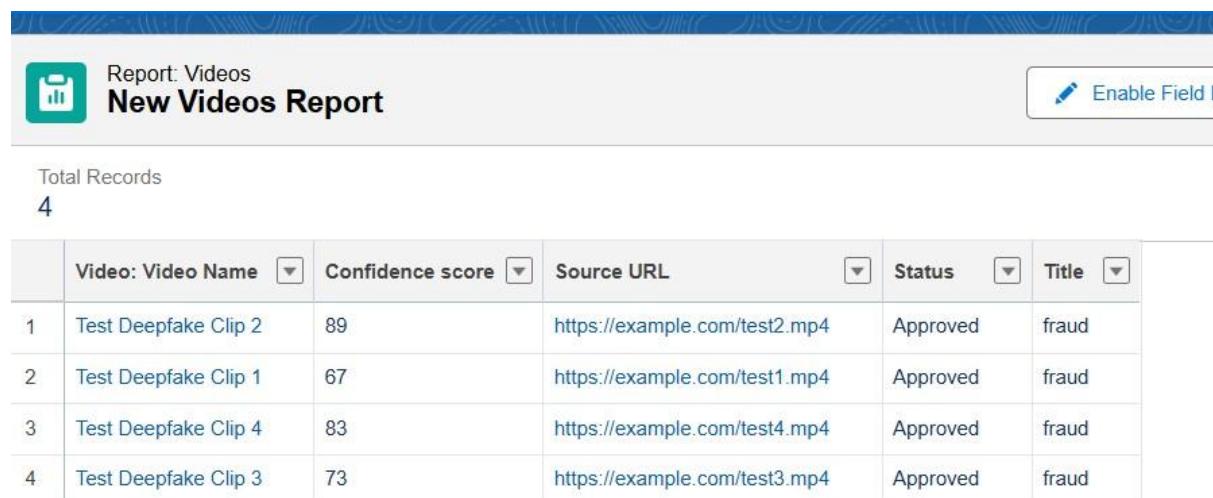
## Phase 9: Reporting, Dashboards & Security Review

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### 1. Reports

Salesforce reports let you analyze and present your data. There are **4 main types**:

- **Tabular Report** ○ Simple list of records, like a spreadsheet.
  - Cannot be used as a source for dashboards if row limit > 2000.
- **Summary Report**
  - Groups records by row, allows subtotals.
  - Useful for metrics like “Revenue by Region”.
- **Matrix Report** ○ Groups records by rows and columns.
  - Best for comparing data across multiple dimensions.
- **Joined Report** ○ Combines multiple reports into a single view. ○ Useful to show data from related objects together.



The screenshot shows a Salesforce report titled "Report: Videos" and "New Videos Report". The report header includes a green icon of a video camera, the report title, and a "Enable Field Bl" button. Below the header, it displays "Total Records 4". The main content is a table with the following data:

	Video: Video Name	Confidence score	Source URL	Status	Title
1	Test Deepfake Clip 2	89	<a href="https://example.com/test2.mp4">https://example.com/test2.mp4</a>	Approved	fraud
2	Test Deepfake Clip 1	67	<a href="https://example.com/test1.mp4">https://example.com/test1.mp4</a>	Approved	fraud
3	Test Deepfake Clip 4	83	<a href="https://example.com/test4.mp4">https://example.com/test4.mp4</a>	Approved	fraud
4	Test Deepfake Clip 3	73	<a href="https://example.com/test3.mp4">https://example.com/test3.mp4</a>	Approved	fraud

## 2. Report Types

- Define which records and fields are available in reports.
- **Standard Report Types:** Pre-built by Salesforce for standard objects.
- **Custom Report Types:** Created for custom objects or specific relationships.
- Allows control over which related objects appear in reports.

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Account History	Standard

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## 3. Dashboards

Visual representation of report data.

- Components: Charts, Tables, Metrics, Gauges.
- Can include data from multiple reports.
- Refresh options: Manual or scheduled.

New Videos Report

Video: Vi...	Con...	Source URL	St...
Test Deepfake Clip 1	67	<a href="https://example.com">https://example.com</a>	Appr...
Test Deepfake Clip 2	89	<a href="https://example.com">https://example.com</a>	Appr...
Test Deepfake Clip 3	73	<a href="https://example.com">https://example.com</a>	Appr...

View Report (New Videos... As of Sep 25, 2025, 2:26 AM

#### 4. Dynamic Dashboards

- Display data based on the **logged-in user's access**.
- Eliminates the need to create multiple dashboards for different roles.
- Maximum of 5 dynamic dashboards per org (for Enterprise Edition).

##### **View Dashboard As**

- Me  
 Another person  
 The dashboard viewer
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## 5. Sharing Settings

Control **who can view and edit records**:

- **Organization-Wide Defaults (OWD)**: Base level of access.
- **Role Hierarchy**: Users higher in hierarchy inherit access of lower roles.
- **Sharing Rules**: Automatic exceptions to OWD.
- **Manual Sharing**: Individual record access.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The top navigation bar includes 'SETUP' and the 'Sharing Settings' page title. A 'Help for this Page' link is in the top right. Below the title, a sub-header says 'Sharing Settings'. A note states: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' A dropdown menu 'Manage sharing settings for:' is set to 'Video'. A button 'Disable External Sharing Model' is visible. The main section is titled 'Default Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. For the 'Video' object, 'Public Read/Write' is listed under Internal Access and 'Private' under External Access. The 'Grant Access Using Hierarchies' checkbox is checked. Below this is a section titled 'Other Settings' with three items: 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). Help links are provided for both sections.

## 6. Field Level Security (FLS)

- Controls **who can view or edit fields** in objects.
- Configured via Profiles or Permission Sets.
- Essential to protect sensitive information like salaries or personal data.

## 7. Session Settings

- Control **user session behavior**:
    - Session timeout duration.
    - Force logout on browser close.
- High-security session settings for sensitive orgs.

The screenshot shows the 'Session Settings' page under the 'SETUP' tab. At the top, it says 'Session Settings'. Below that, a sub-header reads 'Session Settings' with a 'Help for this Page' link. A note says 'Set the session security and session expiration timeout for your organization.' The page is divided into sections: 'Session Timeout' and 'Session Settings'. In 'Session Timeout', the timeout value is set to '1 hour'. Under 'Session Settings', several options are listed, many of which are checked:

- Lock sessions to the IP address from which they originated
- Lock sessions to the domain in which they were first used
- Force relogin after Login-As-User (checked)
- Require HttpOnly attribute
- Use POST requests for cross-domain sessions
- Enforce login IP ranges on every request (info icon)
- When embedding a Lightning application in a third-party site, use a session token instead of a session cookie

## 8. Login IP Ranges

- Restrict login access by IP addresses per profile.
- Useful to secure org access from trusted networks only.

The screenshot shows the 'Login IP Ranges' page under the 'SETUP' tab. At the top, it says 'Login IP Ranges' with a 'New' button and a 'Login IP Ranges Help' link. A table lists one IP range:

Action	IP Start Address	IP End Address	Description
Edit   Del	0.0.0.0	255.255.255.255	

## **9. Audit Trail**

- Tracks **changes in setup and configuration**.
- Maintains history of admin actions for **up to 180 days**.
- Helps in troubleshooting or compliance audits.

### **Tip for Phase 9 Implementation:**

- Create a **summary report**, then use it in a **dashboard**.
- Test **dynamic dashboards** for different user roles.
- Check **field-level security** to ensure sensitive data is hidden.
- Review **audit trail** regularly to monitor org changes.