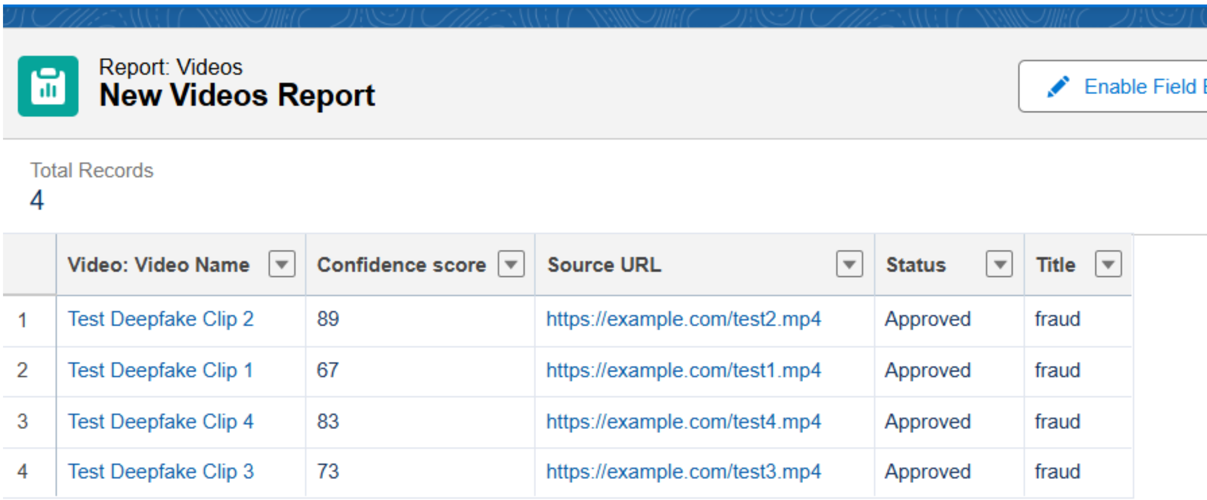
# *Phase 9: Reporting, Dashboards & Security Review*

### 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.



Report: Videos

**New Videos Report**

Enable Field E

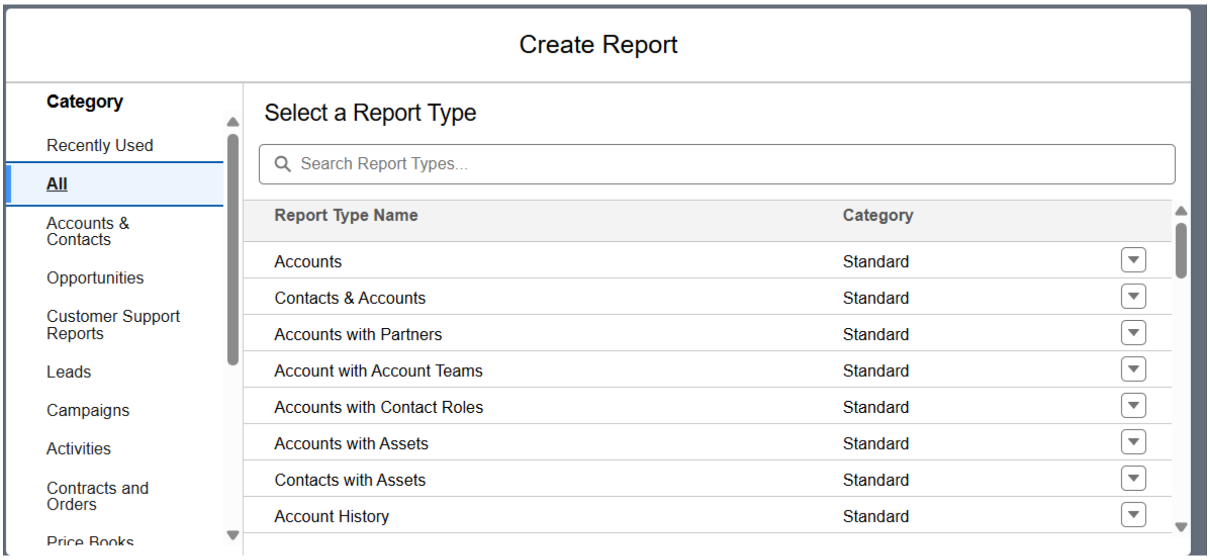
Total Records

4

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

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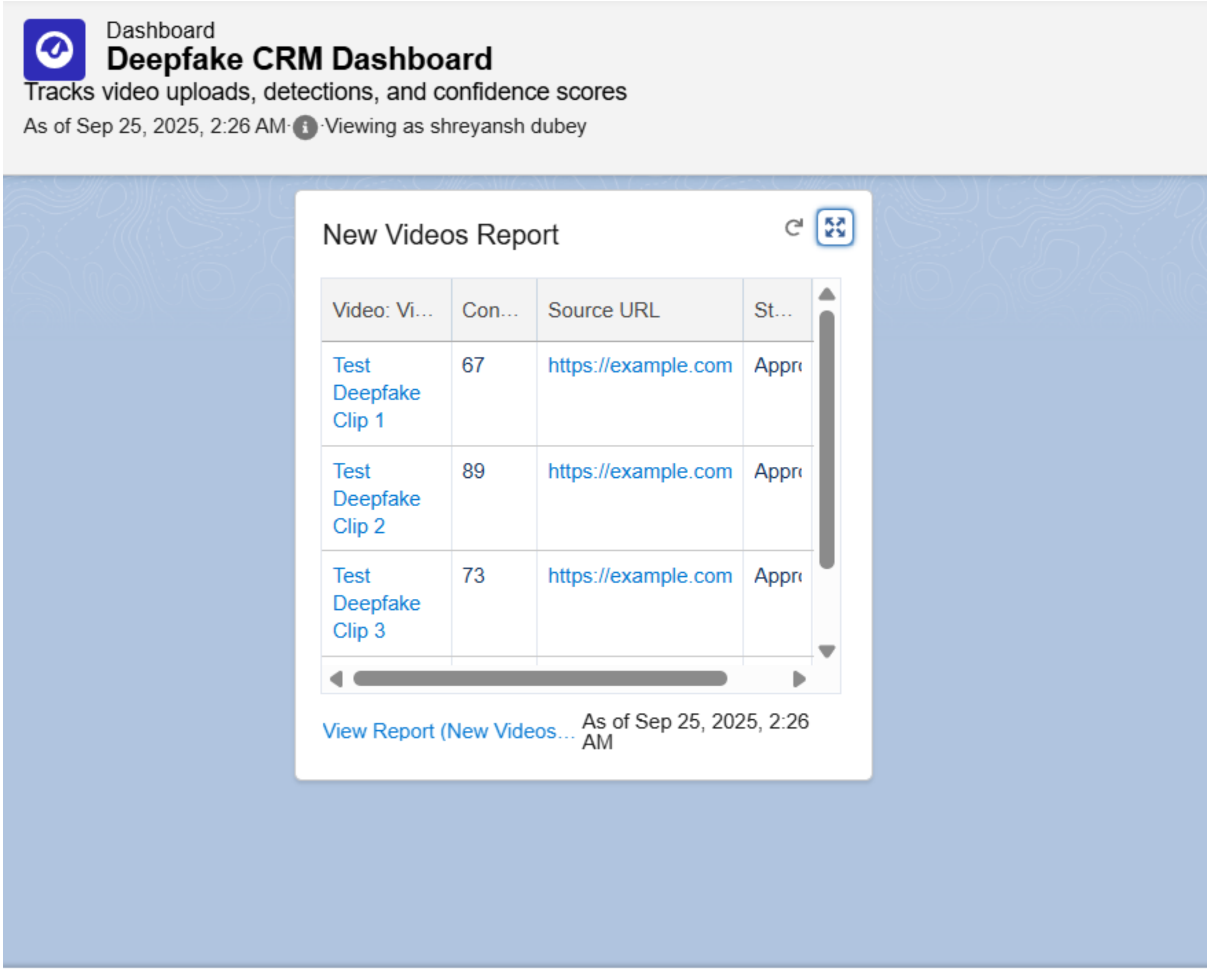
### 3. Dashboards

Visual representation of report data.

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

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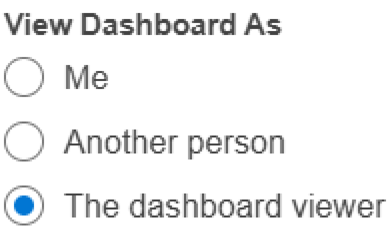
#### 4. Dynamic Dashboards

- 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).

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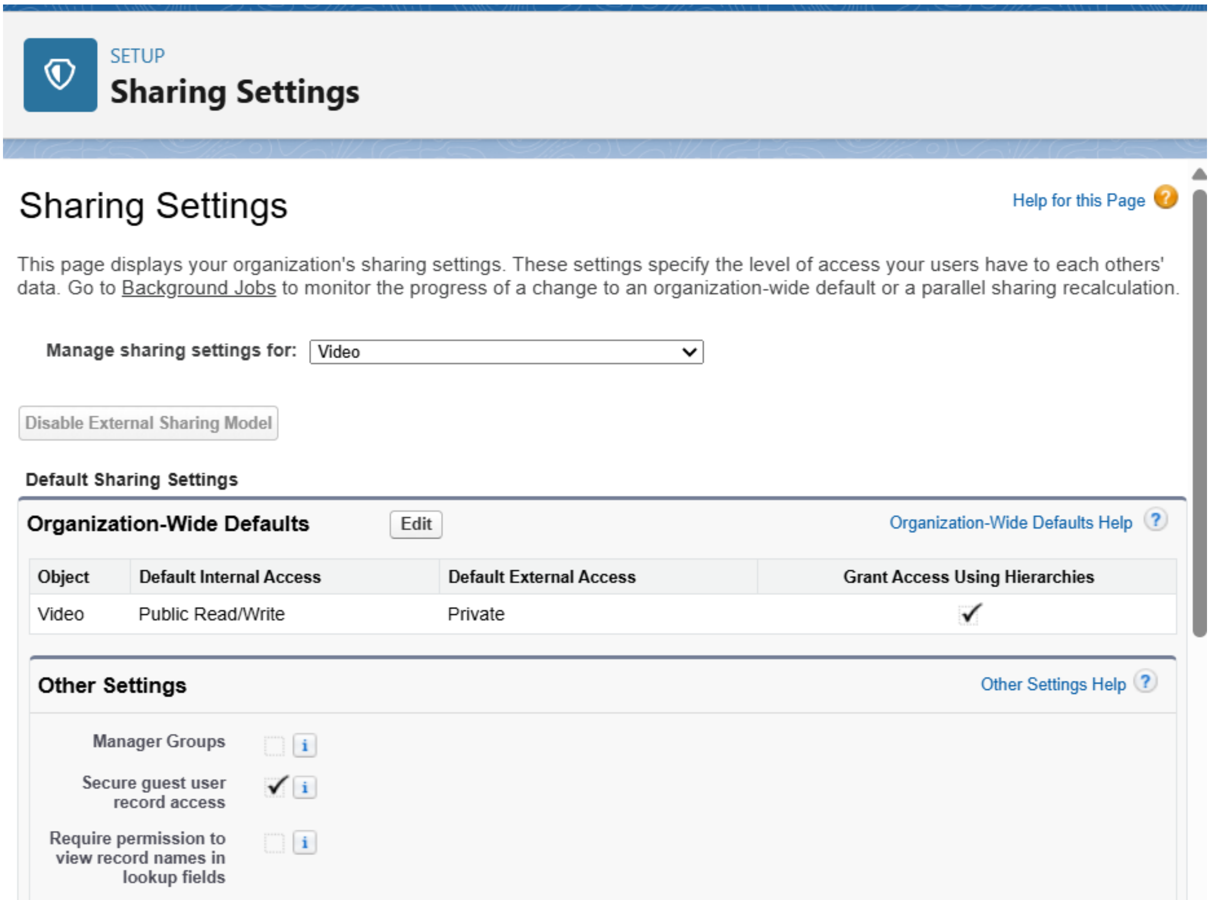
### 5. Sharing Settings

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.

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### 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.

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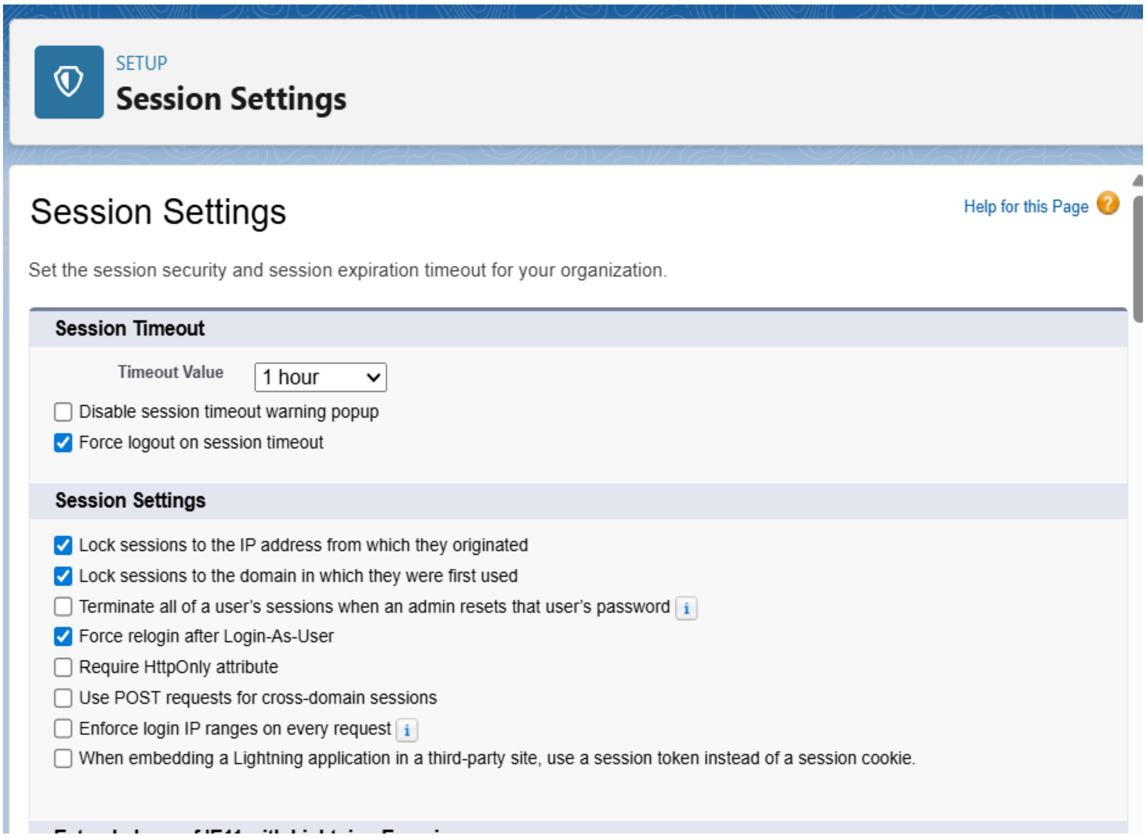
### 7. Session Settings

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

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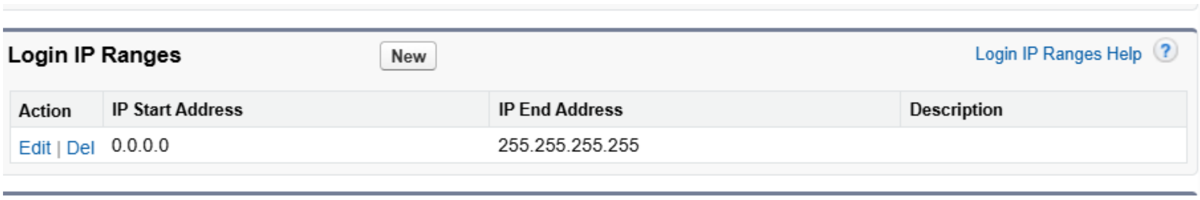
### 8. Login IP Ranges

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

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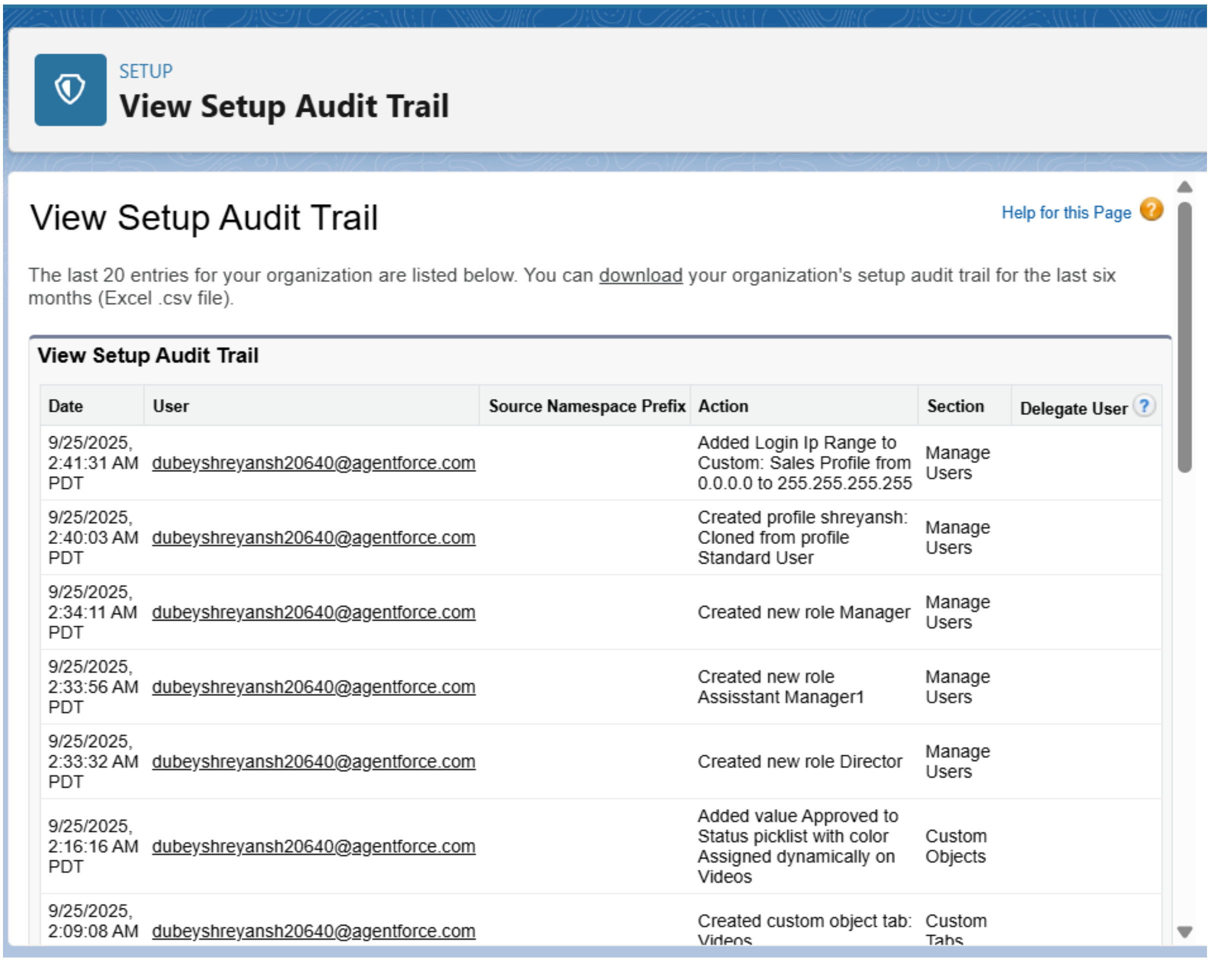
### 9. Audit Trail

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



SETUP

View Setup Audit Trail

View Setup Audit Trail

Help for this Page

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).

View Setup Audit Trail

| Date | User | Source Namespace Prefix | Action | Section | Delegate User |
|---|---|---|---|---|---|
| 9/25/2025, 2:41:31 AM PDT | dubeyshreyansh20640@agentforce.com | | Added Login Ip Range to Custom: Sales Profile from 0.0.0.0 to 255.255.255.255 | Manage Users | |
| 9/25/2025, 2:40:03 AM PDT | dubeyshreyansh20640@agentforce.com | | Created profile shreyansh: Cloned from profile Standard User | Manage Users | |
| 9/25/2025, 2:34:11 AM PDT | dubeyshreyansh20640@agentforce.com | | Created new role Manager | Manage Users | |
| 9/25/2025, 2:33:56 AM PDT | dubeyshreyansh20640@agentforce.com | | Created new role Assisstant Manager1 | Manage Users | |
| 9/25/2025, 2:33:32 AM PDT | dubeyshreyansh20640@agentforce.com | | Created new role Director | Manage Users | |
| 9/25/2025, 2:16:16 AM PDT | dubeyshreyansh20640@agentforce.com | | Added value Approved to Status picklist with color Assigned dynamically on Videos | Custom Objects | |
| 9/25/2025, 2:09:08 AM | dubeyshreyansh20640@agentforce.com | | Created custom object tab: Videos | Custom Tabs | |

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✅ **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.