# Hospital Appointment Management System - Phase 8: Reports & Dashboards

## Overview

Phase 8 focuses on **reporting and data visualization** to monitor hospital operations effectively. Reports and dashboards help management track appointments, doctors, and patient metrics in real-time.

Key objectives: - Track upcoming, completed, and cancelled appointments. - Monitor doctor performance and workloads. - Display hospital metrics in dashboards. - Optional: Create a custom report type combining Appointment, Patient, and Doctor objects.

## 1️⃣ Appointment Report

**Purpose:** View all appointments with their status.

**Steps:** 1. App Launcher → Reports → New Report. 2. Select **Appointments** object → Continue. 3. Apply filters: - Appointment Date: Current & future appointments. - Status: Scheduled, Completed, Cancelled. 4. Add columns: Appointment Date, Appointment Time, Patient Name, Doctor Name, Status. 5. Sort by Appointment Date (optional). 6. Save & Run: - Name: Appointment Status Report - Folder: Accounts & Contacts (since custom folder unavailable)

## 2️⃣ Doctor Performance Report

**Purpose:** Monitor doctor workloads.

**Steps:** 1. New Report → Select **Doctor** object → Continue. 2. Filters: Active doctors only. 3. Add columns: Doctor Name, Number of Appointments, Status. 4. Group by Doctor Name. 5. Save & Run: - Name: Doctor Performance Report - Folder: Accounts & Contacts

## 3️⃣ Dashboard – Hospital Metrics

**Purpose:** Visual overview of appointments and doctor performance.

**Steps:** 1. App Launcher → Dashboards → New Dashboard. 2. Name: Hospital Dashboard 3. Folder: Accounts & Contacts. 4. Add components: - Pie Chart: Appointment status (Scheduled / Completed / Cancelled) → Source: Appointment Report - Bar Chart: Appointments per Doctor → Source: Doctor Performance Report - Table: Upcoming Appointments → Source: Appointment Report 5. Customize charts: - Pie chart: Segment by Status - Bar chart: Group by Doctor Name - Table: Include Appointment Date, Time, Patient, Doctor 6. Save & Run Dashboard.

## 4️⃣ Custom Report Type – Appointment with Patient & Doctor

**Purpose:** Combine Appointment, Patient, and Doctor for advanced reporting.

**Steps:** 1. Setup → Report Types → New Custom Report Type. 2. Primary Object: Appointments 3. Display Label: Appointment with Patient & Doctor 4. API Name: Appointment\_with\_Patient\_Doctor 5. Description: Report combining Appointment, Patient, and Doctor details. 6. Store in Category: **Accounts & Contacts** (since custom folders not available) 7. Status: **Deployed** 8. Save. 9. Add Related Objects: - Patient (Each Appointment must have a Patient) - Doctor (Each Appointment may have a Doctor) 10. Save related objects. 11. Now you can create reports using this custom report type with fields from Appointment, Patient, and Doctor.