

Phase 9 — Reporting, Dashboards & Security Review

Report Types

- **Understanding Report Types:**

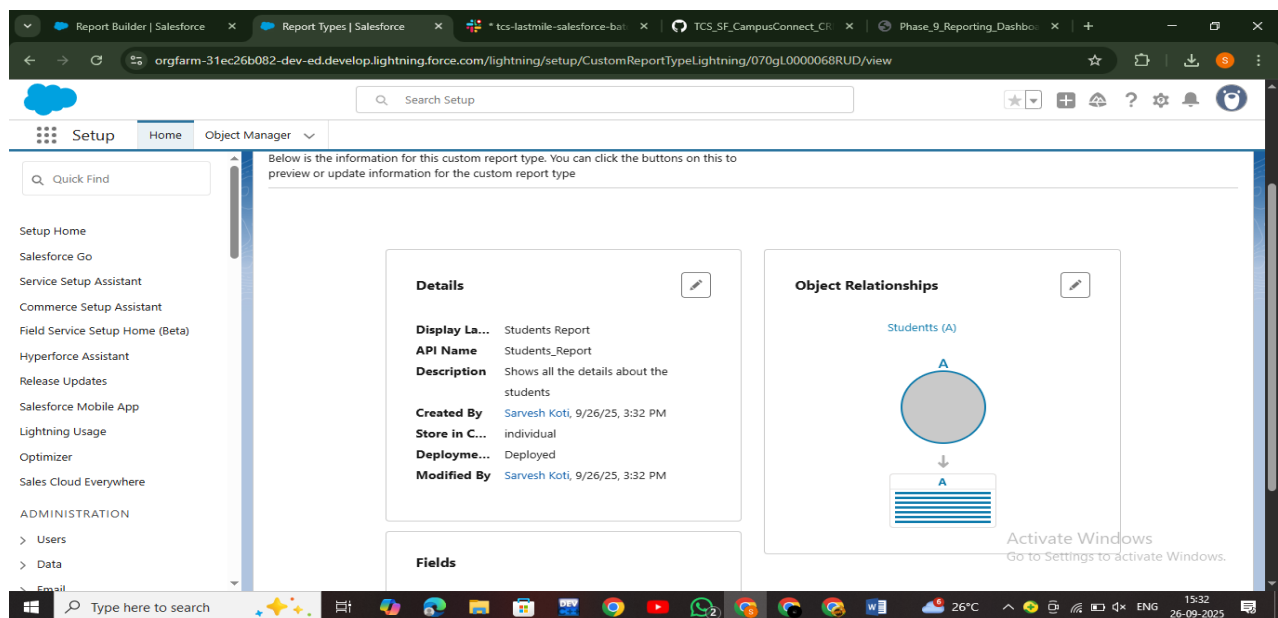
Report types determine which objects and fields are available in report building. Salesforce offers:

- **Standard Report Types:** Prebuilt types like Accounts, Contacts, etc.
- **Custom Report Types:** Created specifically to link multiple objects for complex data views.

- **Creating Custom Report Types:**

For the CampusConnect CRM, build report types that reflect your data relationships:

- **Clubs with Members:** Combines the Club__c object with related ClubMembership__c records. This report type enables you to list each club along with its members, facilitating insights like member counts or active involvement.
- **Students with Clubs:** Joins Contact (or a custom Student__c object) with ClubMembership__c to track each student's affiliations with clubs. This helps generate reports on student engagement across multiple clubs.



Report Formats

- **Tabular Reports:**

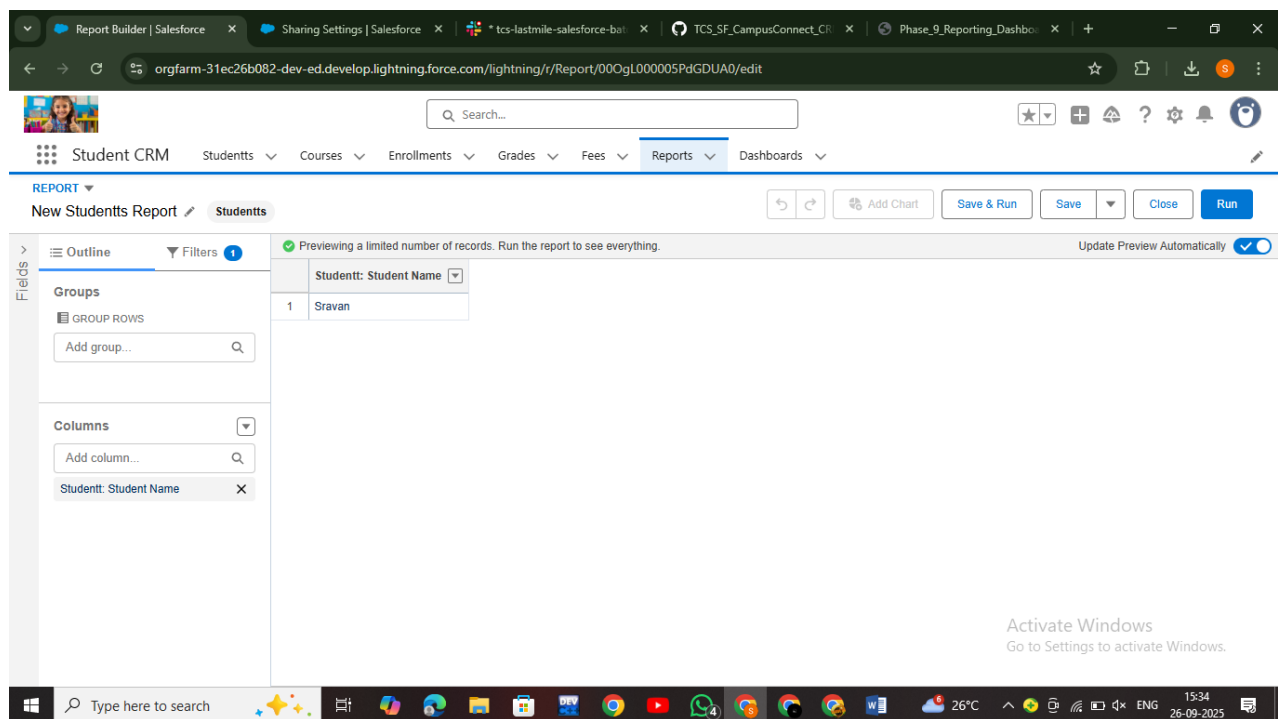
Basic lists without grouping, ideal for simple data retrieval. Example: List of all students with their club memberships.

- **Summary Reports:**

Records are grouped by one or more fields, allowing subtotals and roll-ups. Example: Number of students grouped by each club, which provides an overview of club sizes.

- **Matrix and Joined Reports:**

Useful for advanced reporting, such as cross-object summarization and combining multiple related reports to analyze complex data trends, e.g., events participation intersecting with volunteer hours.



Dashboards

Building Visual Insights

- **Dashboard Components:** Use charts (bar, pie), tables, gauges, and metrics to visually represent data from reports.

- **Example Metrics:**
 - Number of active club members per club
 - Upcoming club events and event attendance counts
 - Volunteer participation rates per event or club

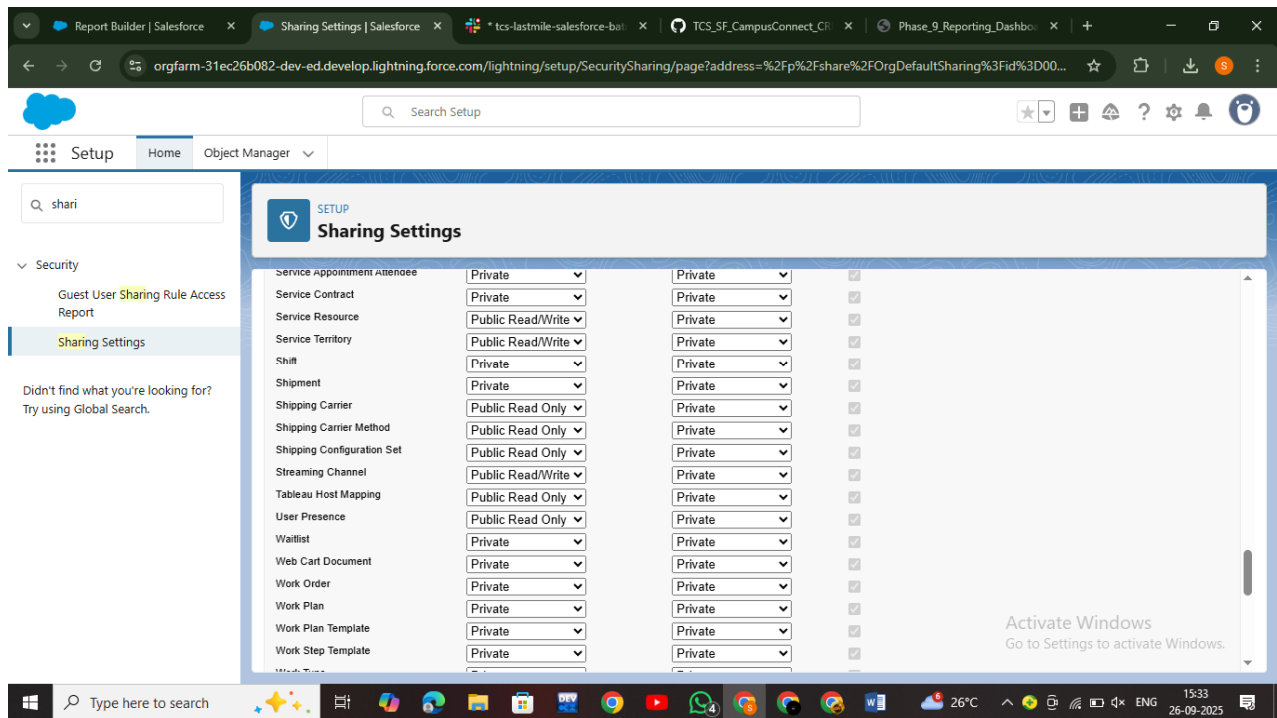
Dynamic Dashboards

- Dashboards that adapt to the **logged-in user's security context**, ensuring users see only data they are authorized to view.
- **Role-based Example Views:**
 - **Faculty:** Access to all clubs, members, and events for oversight and analysis.
 - **Club Leaders:** See only the events and members related to their clubs to manage effectively.
 - **Students:** View only their own club registrations and event participation, preserving privacy.
- This setup prevents unauthorized data exposure while providing tailored insights.

Security Review

Sharing Settings

- Implement record-level sharing via:
 - **Organization-Wide Defaults (OWD):** Base access level for records.
 - **Role Hierarchies:** Higher roles inherit access from lower roles.
 - **Sharing Rules:** Exceptions to OWD to grant access to specific groups.



- **CampusConnect Example:**

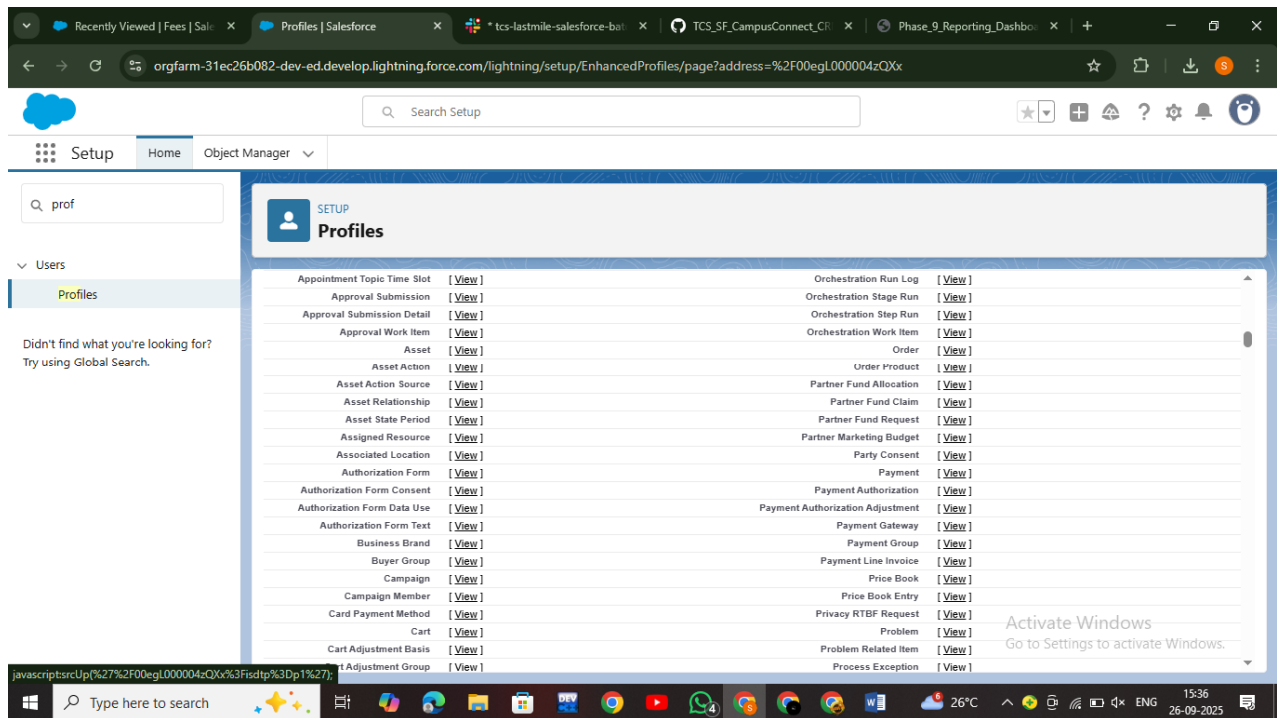
- Faculty have broad visibility across all clubs.
- Club Leaders limited to students who are members of their club.
- Students restricted to only their own club participations.

These controls balance collaboration with confidentiality.

Field Level Security (FLS)

- Controls visibility and editability of individual fields within objects.
- **Example Settings:**
 - Faculty_email hidden from student profiles to maintain privacy.
 - Club contact info editable by Faculty and Admin but view-only or hidden from students.

This prevents unauthorized viewing or modifying of sensitive information.



Session & Login Settings

- **Session Timeout:** Set Salesforce to log users out after 30 minutes of inactivity.
 - This limits risks of unauthorized access on unattended devices.
- **Login IP Restrictions:**
 - Enforce IP ranges for profiles (e.g., Faculty may only log in from the college network).
 - Prevents unauthorized access from outside trusted networks.

Audit Trail

- Enable audit logs to capture:
 - Setup changes (field creation, object changes).
 - Modifications to sharing rules or permissions.
 - Helps with troubleshooting and compliance audits, providing transparency on administrative actions.