

Phase 9: Reporting, Dashboards & Security Review

1. Reports

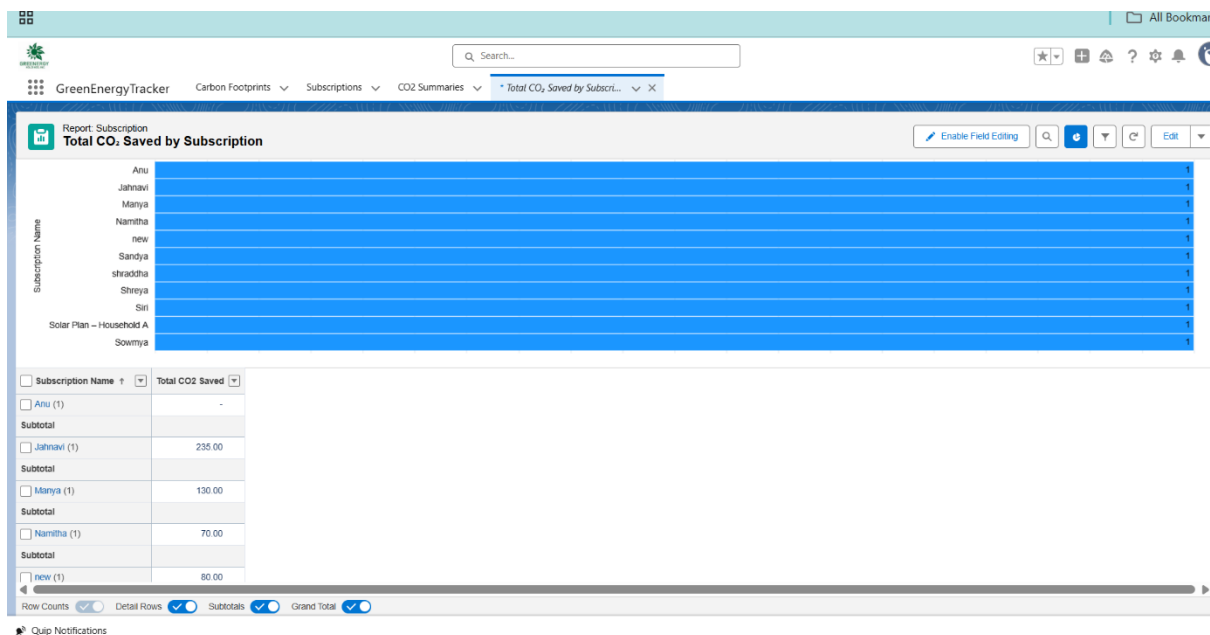
Purpose: Analyze Carbon Footprint and Subscription data for insights.

Steps Completed:

- Created Tabular Reports for CarbonFootprint__c records.
 - Fields included: Name, CO2_Reduced__c, CO2_Saved__c, Entry_Date__c.
- Created Summary Reports to group data by Energy Type.
- Created Matrix Reports to analyze CO2 reduction by Subscription owner and Energy Type.
- Created Joined Reports to combine CarbonFootprint__c and Subscription__c data for integrated analysis.

Outcome:

Users can view detailed carbon reduction statistics, track subscriptions, and identify trends.



The screenshot displays a Quip report interface. At the top, there's a navigation bar with 'GreenEnergyTracker' and several tabs: 'Carbon Footprints', 'Subscriptions', 'CO2 Summaries', and a selected tab '* Total CO2 Saved by Subscri...'. Below the navigation bar, the report title is 'Report: Subscription' and 'Total CO2 Saved by Subscription'. The main content area shows a table with two columns: 'Subscription Name' and 'Total CO2 Saved'. The table lists several subscriptions with their respective CO2 saved values. Below the table, there's a summary section with checkboxes for each subscription name and a 'Subtotal' row for each group. At the bottom, there are toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently turned on.

Subscription Name	Total CO2 Saved
Anu	1
Jahnvi	1
Manya	1
Namitha	1
new	1
Sandya	1
shradha	1
Shranya	1
Siri	1
Solar Plan - Household A	1
Sowmya	1

Subscription Name	Total CO2 Saved
<input type="checkbox"/> Anu (1)	-
Subtotal	
<input type="checkbox"/> Jahnvi (1)	235.00
Subtotal	
<input type="checkbox"/> Manya (1)	130.00
Subtotal	
<input type="checkbox"/> Namitha (1)	70.00
Subtotal	
<input type="checkbox"/> new (1)	80.00

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

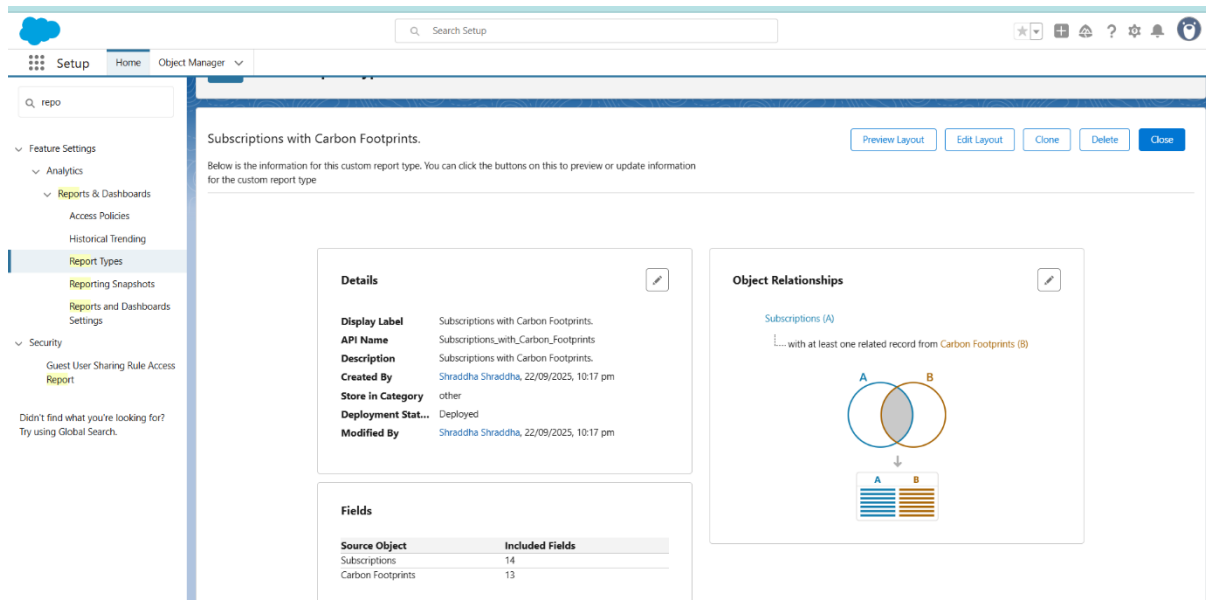
2. Report Types

Steps Completed:

- Created Custom Report Types for CarbonFootprint__c and Subscription__c.
- Allowed reporting across related objects for more comprehensive insights.

Outcome:

Reports can now include fields from related objects (e.g., Subscription owner, Total CO2 Saved) for deeper analysis.



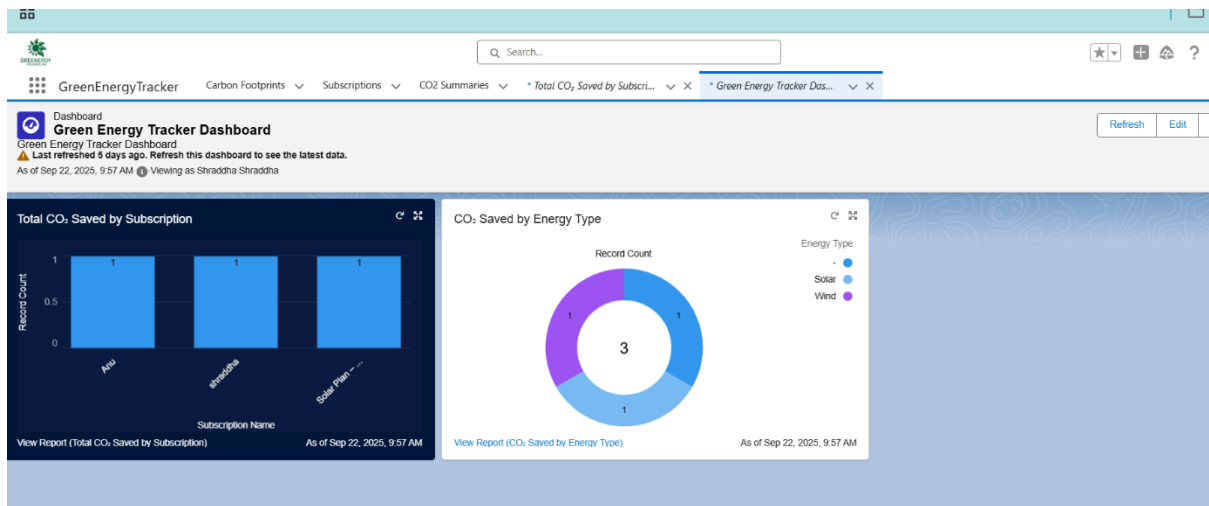
3. Dashboards

Steps Completed:

- Built a GreenEnergyTracker Dashboard with key metrics:
 - Total CO2 Reduced
 - CO2 Saved by Energy Type
 - Active Subscriptions
 - Average CO2 Reduction per Subscription
- Added Charts and Graphs for visual representation:
 - Pie Chart: CO2 Saved by Energy Type
 - Bar Chart: CO2 Reduction per Month
- Configured Dynamic Dashboards so each user sees only their relevant data.

Outcome:

Real-time visualization of energy savings and carbon reduction metrics for all users.



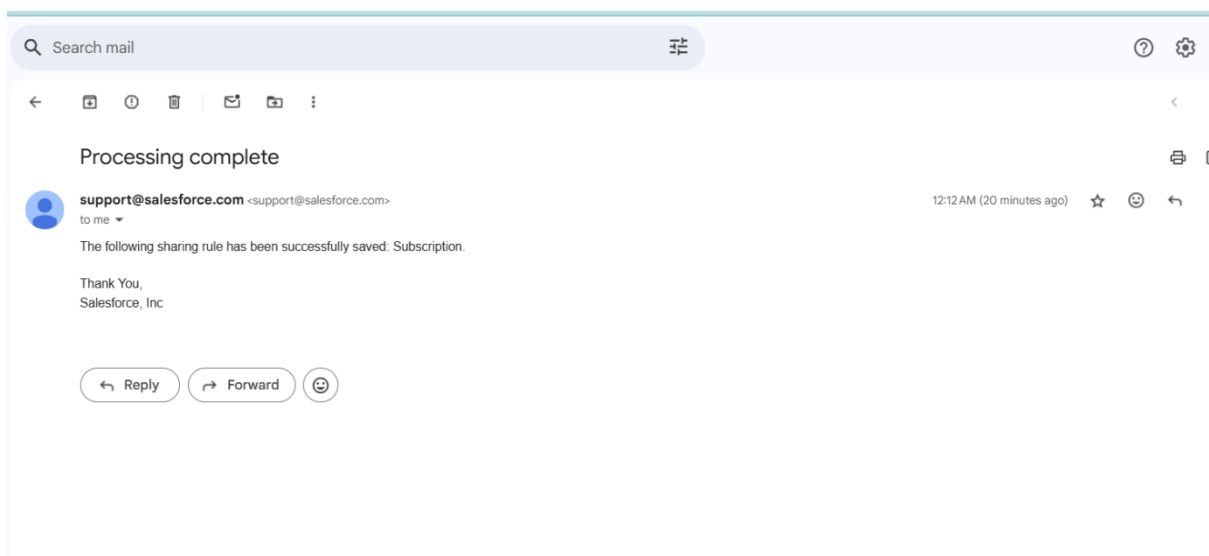
4. Sharing Settings

Steps Completed:

- Set **Organization-Wide Defaults (OWD)**:
 - CarbonFootprint__c → Private
 - Subscription__c → Private
- Configured **Sharing Rules** for specific teams/groups to access high-level summary data.

Outcome:

Sensitive carbon footprint data is protected while enabling sharing with authorized users.



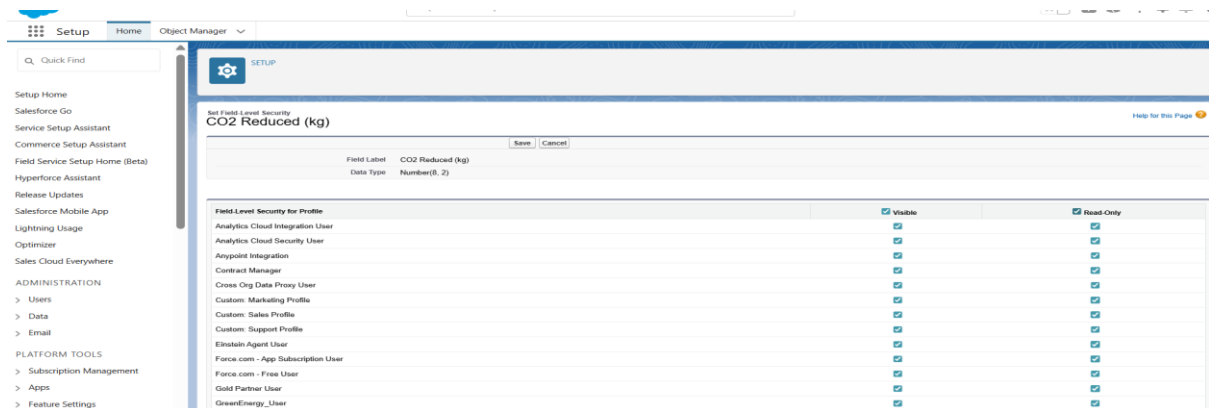
5. Field-Level Security (FLS)

Steps Completed:

- Restricted sensitive fields such as CO2_Reduced__c and CO2_Saved__c to only authorized profiles.
- Made some fields read-only for standard users to prevent accidental modification.

Outcome:

Ensures users can only access or edit fields according to their profile permissions.



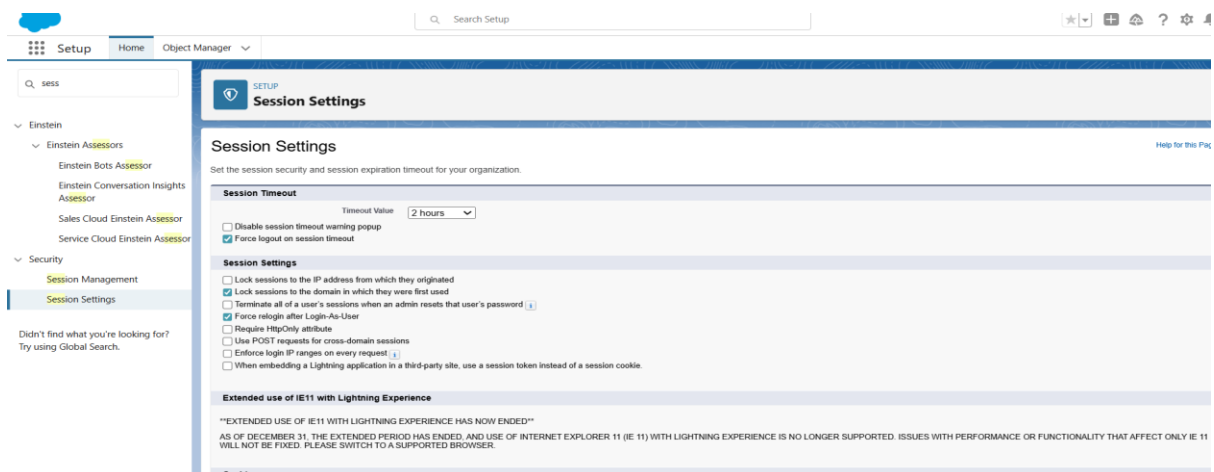
6. Session Settings

Steps Completed:

- Configured **Session Timeout**: 30 minutes.
- Enabled **Force logout on browser close**.
- Locked sessions to IP ranges for sensitive profiles.

Outcome:

Enhances security by limiting session duration and controlling access locations.



7. Login IP Ranges

Steps Completed:

- Defined IP ranges for profiles to restrict Salesforce access to authorized networks.
- Verified inclusion of current working IP (202.62.70.205) to avoid lockout.

Outcome:

Users can access Salesforce only from approved networks, reducing unauthorized access risk.

The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP Profiles' and includes a search bar and a 'Search Setup' field. Below the header, there are tabs for 'Edit', 'Clone', and 'View Users'. The 'Login Hours' section shows 'No login hours specified'. The 'Login IP Ranges' section is active, displaying a table with columns for 'Action', 'IP Start Address', 'IP End Address', and 'Description'. A single entry is shown with '202.62.70.205' for both start and end addresses. Other sections include 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', and 'Enabled External Credential Principal Access', all showing 'No [feature] enabled'.

Action	IP Start Address	IP End Address	Description
Edit Del	202.62.70.205	202.62.70.205	