

Phase 9: Reporting, Dashboards & Security Review

1. Reports

Salesforce Reports let you analyze data from your AI Career Coach app (like student progress, test scores, or career recommendations).

- **Tabular Reports:**
 - Simple list of records.
 - Example: List of all users with their latest assessment scores.
 - **Summary Reports:**
 - Group data by rows; can include subtotals.
 - Example: Group students by career goal and show average quiz scores.
 - **Matrix Reports:**
 - Group data by rows and columns.
 - Example: Compare completion rates of courses across different batches and instructors.
 - **Joined Reports:**
 - Combine multiple report blocks.
 - Example: Show both assessment results and coaching session feedback in one report.
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2. Report Types

- Custom or standard report types define which objects and fields are available in reports.
 - Example for AI Career Coach:
 - **Custom Report Type:** “Student Progress with Course Completion” linking Student and Assessment objects.
 - Allows reports combining data across multiple objects.
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3. Dashboards

Visualize your AI Career Coach metrics in one place.

- **Key Components:**
 - Charts: Bar, Pie, Line, Funnel
 - Metrics: Total assessments completed, average score, number of active users
 - Filters: By batch, career goal, or assessment type
 - **Example:**
 - Dashboard showing:
 - Top 5 career paths chosen
 - Assessment completion rate
 - Average score trends over time
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4. Dynamic Dashboards

- Dashboards that change based on the user viewing them.
 - Example:
 - A mentor sees only their students' data, while the admin sees data for all users.
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5. Sharing Settings

- Control who can see which records.
 - Key options: Public Read/Write, Public Read Only, Private.
 - Example:
 - Students see only their own progress.
 - Coaches see progress for their assigned students.
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6. Field Level Security (FLS)

- Control which fields users can view or edit.
- Example:
 - Hide sensitive fields like user email or internal notes from students.

- Coaches can view assessment scores; students cannot edit them.
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7. Session Settings

- Manage user sessions for security.
 - Key settings:
 - Session timeout duration
 - Session security levels for different profiles
 - Example: Log out users automatically after inactivity to protect student data.
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8. Login IP Ranges

- Restrict login access to trusted IP ranges.
 - Example:
 - Admins can log in only from office IPs.
 - Students can log in from anywhere but require MFA.
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9. Audit Trail

- Track changes in Salesforce setup and configuration.
- Example:
 - See who modified report filters, dashboard components, or sharing rules.
 - Helps maintain compliance and troubleshoot changes in AI Career Coach metrics.