

Phase 9: Reporting, Dashboards & Security Review (Campus CRM + Student Club)

Screenshots:-

Report Types(Events with Volunteers):-

The screenshot shows the Salesforce Setup page for a custom report type named 'Events with Volunteers'. The left sidebar contains a navigation menu with 'Feature Settings' expanded, showing 'Analytics' > 'Reports & Dashboards' > 'Report Types'. The main content area displays the report type details and object relationships.

Details

Display Label	Events with Volunteers
API Name	Events_with_Volunteers
Description	Events with Volunteers
Created By	Adarsh Prajapati, 9/24/25, 3:10 PM
Store in Cate...	activities
Deployment ...	In Development
Modified By	Adarsh Prajapati, 9/24/25, 3:10 PM

Object Relationships

Club Events (A)
... with at least one related record from Activities (B)

The diagram shows two overlapping circles, A (Club Events) and B (Activities), with a shaded intersection. Below the diagram is a table with columns A and B.

Fields

Source Object	Included Fields
Club Events	Club Events
Activities	Activities

Student With Clubs:-

The screenshot shows the Salesforce Setup page for a custom report type named 'Students with Clubs'. The left sidebar contains a navigation menu with 'Feature Settings' expanded, showing 'Analytics' > 'Reports & Dashboards' > 'Report Types'. The main content area displays the report type details and object relationships.

Details

Display Label	Students with Clubs
API Name	Students_with_Clubs
Description	students with clubs.
Created By	Adarsh Prajapati, 9/24/25, 3:08 PM
Store in Cate...	employee
Deployment ...	In Development
Modified By	Adarsh Prajapati, 9/24/25, 3:13 PM

Object Relationships

Contacts (A)
... with at least one related record from Club Memberships (B)

The diagram shows two overlapping circles, A (Contacts) and B (Club Memberships), with a shaded intersection. Below the diagram is a table with columns A and B.

Fields

Source Object	Included Fields
Contacts	66
Club Memberships	3

Club With Members:-

The screenshot shows the Salesforce Setup interface for a custom report type named 'Clubs with Members'. The left sidebar contains navigation options like 'Feature Settings', 'Analytics', 'Reports & Dashboards', and 'Security'. The main content area is divided into two panels: 'Details' and 'Object Relationships'.

Details Panel:

- Display Label:** Clubs with Members
- API Name:** Clubs_with_Members
- Description:** Shows club records alongside their club membership records.
- Created By:** Adarsh Prajapati, 9/24/25, 3:07 PM
- Store in Category:** employee
- Deployment Status:** In Development
- Modified By:** Adarsh Prajapati, 9/24/25, 3:14 PM

Object Relationships Panel:

Clubs (A) with at least one related record from Club Events (B)

The relationship is visualized with a Venn diagram showing two overlapping circles, A (Clubs) and B (Club Events). Below the diagram, a table shows the source objects and their included fields:

Source Object	Included Fields
Clubs	14
Club Events	1

Sharing Settings:-

The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' page. The left sidebar contains navigation options like 'Security', 'Guest User', and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and contains a table of sharing settings for various objects.

Sharing Settings Table:

Object	Public Read/Write	Public Read Only	Private	Controlled by Parent
User Presence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waitlist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web Cart Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Step Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club Event	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Course	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Settings:

- Standard Report Visibility: ☒
- Manual User Record Sharing: ☐
- Manager Groups: ☐
- Secure guest user record access: ☐
- Require permission to view record names in lookup fields: ☐

Field Level Security:-

The screenshot shows the Salesforce Field Level Security setup page for the 'Club Phone' field. The page title is 'Set Field-Level Security Club Phone'. Below the title, there are 'Save' and 'Cancel' buttons. A table lists the field's properties: 'Field Label' is 'Club Phone' and 'Data Type' is 'Phone'. Below this, a table titled 'Field-Level Security for Profile' shows the security settings for various profiles. The 'Visible' and 'Read-Only' columns have checkboxes. The 'Club Leader' and 'Contract Manager' profiles have the 'Visible' checkbox checked.

Field Label	Club Phone
Data Type	Phone
Field-Level Security for Profile	
Analytics Cloud Integration User	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Analytics Cloud Security User	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Anypoint Integration	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
CampusConnect Admin	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Club Leader	<input checked="" type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Cross Org Data Proxy User	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Custom: Marketing Profile	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Custom: Sales Profile	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only

Session Settings:-

Force logout in 30min to prevent student & club data.

The screenshot shows the Salesforce Session Settings page. The page title is 'Session Settings'. Below the title, there is a description: 'Set the session security and session expiration timeout for your organization.' The 'Session Timeout' section has a 'Timeout Value' dropdown set to '30 minutes'. Below this, there are two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). The 'Session Settings' section has several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked). At the bottom, there is a message: 'Extended use of IE11 with Lightning Experience' and 'AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY'.

Reports (Tabular, Summary, Matrix, Joined)

- **Tabular Reports:** Simple lists of records; no grouping.
 - List of all students with Club Memberships.
 - **Summary Reports:** Records grouped by field; can show subtotals.
 - Number of students per club.
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Report Types

- Define which objects and fields are available for reporting.
 - **Standard Report Types:** Prebuilt (e.g., Accounts, Contacts).
 - **Custom Report Types:** Created for complex relationships.
 - Example:
 - *Clubs with Members* → Club__c + ClubMembership__c
 - *Students with Clubs* → Contact + ClubMembership__c
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Dashboards

- Visual representation of report data using **charts, tables, gauges, and metrics**.
 - Example: Dashboard showing number of active club members, upcoming events, and volunteer participation.
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Dynamic Dashboards

- Dashboards that display data **based on the logged-in user's access**.
 - Example:
 - Faculty sees all clubs.
 - Club Leader sees only their club events and members.
 - Students see only their registrations.
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Sharing Settings

- Control access to records based on OWD, roles, and sharing rules.
- CampusConnect implementation:
 - Faculty → access all clubs

- Club Leaders → view students registered for their events
 - Students → restricted to their own registrations and profile
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Field Level Security (FLS)

- Controls which fields are **visible or editable** per profile or permission set.
 - Example:
 - Hide internal fields (like Faculty_email) from students.
 - Faculty and Admin can view/edit club contact info.
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Session Settings

- Configure **session timeout, security, and login restrictions**.
 - Example: Set timeout to 30 minutes of inactivity to secure sensitive student/club data.
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Login IP Ranges

- Restrict login access based on **IP addresses** for profiles.
 - Example: Faculty profile restricted to college network IPs.
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Audit Trail

- Tracks **administrative changes** to setup and configuration.
 - Captures changes such as: field creation, object modification, sharing rules updates.
 - Helps in **compliance and troubleshooting**.
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Phase 9 Key Takeaways:

- CampusConnect CRM uses **custom report types** to create meaningful insights.
- Dashboards and dynamic dashboards provide role-based visualization.
- Sharing settings, FLS, session settings, login IPs, and audit trails enforce **data security and compliance**.