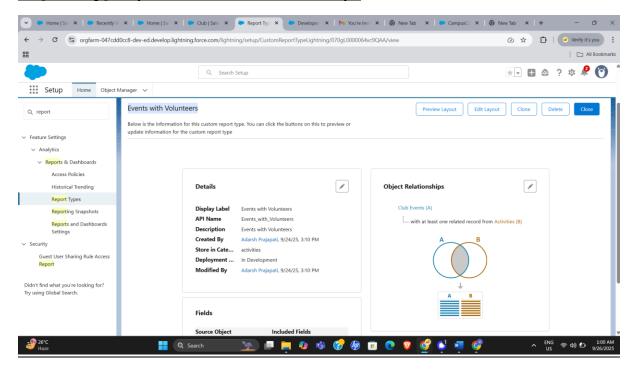
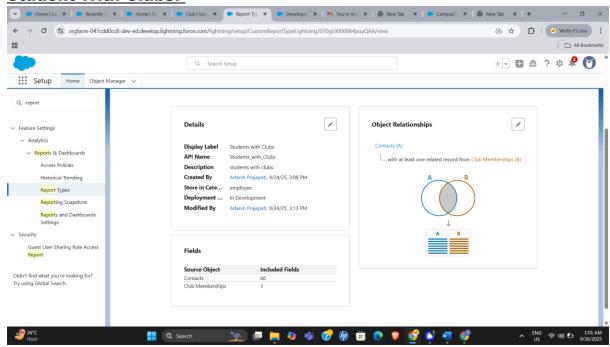
# Phase 9: Reporting, Dashboards & Security Review (Campus CRM + Student Club)

### **Screenshots:-**

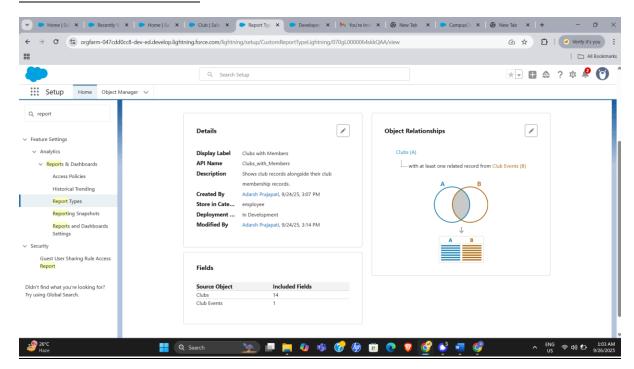
## Report Types(Events with Volunteers):-



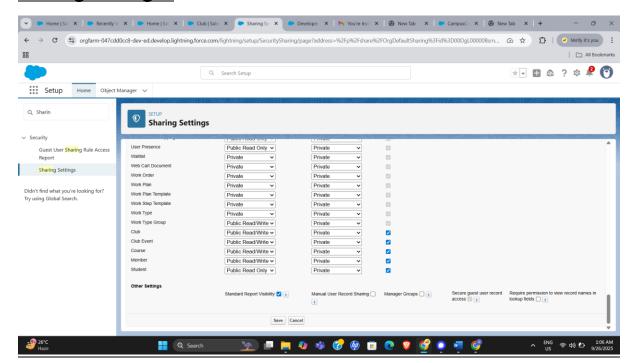
#### **Student With Clubs:-**



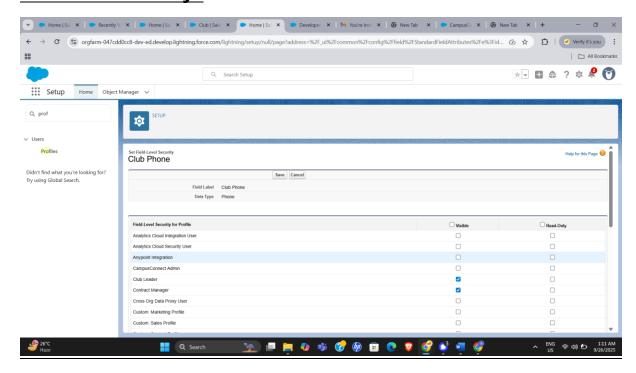
#### **Club With Members:-**



## **Sharing Settings:-**

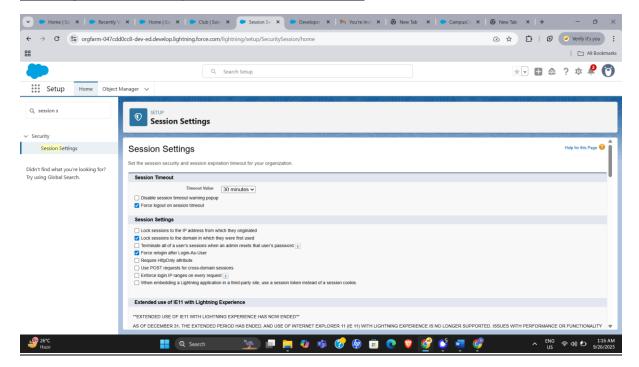


## **Field Level Security:-**



# **Session Settings:-**

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



## Reports (Tabular, Summary, Matrix, Joined)

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

## **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.
  - o Example:
    - Clubs with Members → Club\_c + ClubMembership\_c
    - Students with Clubs → Contact + ClubMembership\_c

#### **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.

## **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.
  - o Students see only their registrations.

## **Sharing Settings**

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

- o Club Leaders → view students registered for their events
- Students → restricted to their own registrations and profile

## **Field Level Security (FLS)**

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

## **Session Settings**

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

# **Login IP Ranges**

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

### **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.

# 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.