

# PHASE 9: REPORTING, DASHBOARDS & SECURITY REVIEW

**Goal:** Provide real-time insights into events, participants, and registrations while ensuring the application is secure and compliant with Salesforce's best practices.

## 1. Reports

- Multiple report formats were explored:
  - **Tabular Reports:** For simple lists, e.g., list of all participants registered for a specific event.
  - **Summary Reports:** For grouped totals, e.g., number of registrations per event.
  - **Matrix Reports:** For comparing multiple dimensions, e.g., registrations per event vs. registration status.
  - **Joined Reports:** For combining related objects, e.g., Event data with Registration details in a single report.
- Example Reports created:
  - *Registrations by Event* — summary report grouped by Event name.

The screenshot shows the Salesforce Lightning Report interface. At the top, there's a navigation bar with 'Smart Event Manag...' and a search bar. Below it, a breadcrumb trail shows 'Home > Lightning Report'. The report title is 'Report: Registrations with Event and Participant Registrations by Event'. The report shows a table with columns: Event: Event Name, Registration Name, Participant: Participant Name, and Status. The data is grouped by Event, showing 'Hackathon (1)' and 'Programming (1)'. The total number of records is 2. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

Event: Event Name	Registration Name	Participant: Participant Name	Status
Hackathon (1)	REG-0013	John Doe	-
Subtotal			
Programming (1)	REG-0016	John Doe	-
Subtotal			
Total (2)			

## 2. Report Types

- A custom report type was created linking **Event\_\_c** with **Registration\_\_c** and **Participant\_\_c**.
- This enabled reporting across all three objects, e.g., “List of Participants by Event.”
- Custom report types ensure only relevant fields are available for reporting, improving clarity for end users.

**Custom Report Types**

**Registrations with Event and Participant**

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

[Preview Layout](#) [Edit Layout](#) [Clone](#) [Delete](#) [Close](#)

**Details**

**Display Label** Registrations with Event and Participant  
**API Name** Registrations\_with\_Event\_and\_Participant  
**Description** Registrations with Event and Participant  
**Created By** Vismitha K, 26/09/2025, 09:39 pm  
**Store in Cate...** other  
**Deployment ...** Deployed  
**Modified By** Vismitha K, 26/09/2025, 09:40 pm

**Fields**

Source Object	Included Fields
Registrations	15

**Object Relationships**

Registrations (A)

A

A

### 3. Dashboards

- Dashboards were created to provide a **visual summary of event management KPIs**.
- Components used:
  - **Bar Chart:** Registrations per Event.
  - **Pie Chart:** Distribution of Participants by Registration Status.
  - **Metric:** Total Revenue from registrations.
- A **Manager Dashboard** was created to give a high-level view of event performance.

**Manager Dashboard**

As of Sep 26, 2025, 9:32 AM Viewing as Vismitha K

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**Registrations by Event**

Event Name	Record Count
Hackathon	1
Programming	1

[View Report \(Registrations by Event\)](#) As of Sep 26, 2025, 9:32 AM

**Registrations**

Event Name	Record Count
Hackathon	1
Programming	1

[View Report \(Registrations by Event\)](#) As of Sep 26, 2025, 9:32 AM

**Total Count**

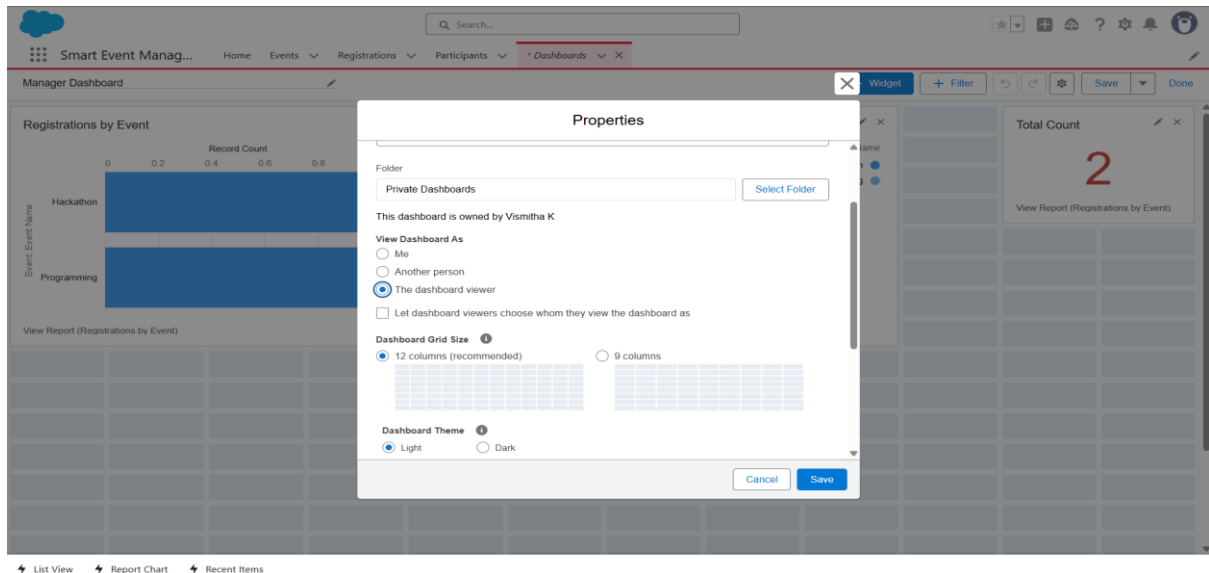
2

[View Report](#) As of Sep 26, 2025, 9:32 AM

[List View](#) [Report Chart](#) [Recent Items](#)

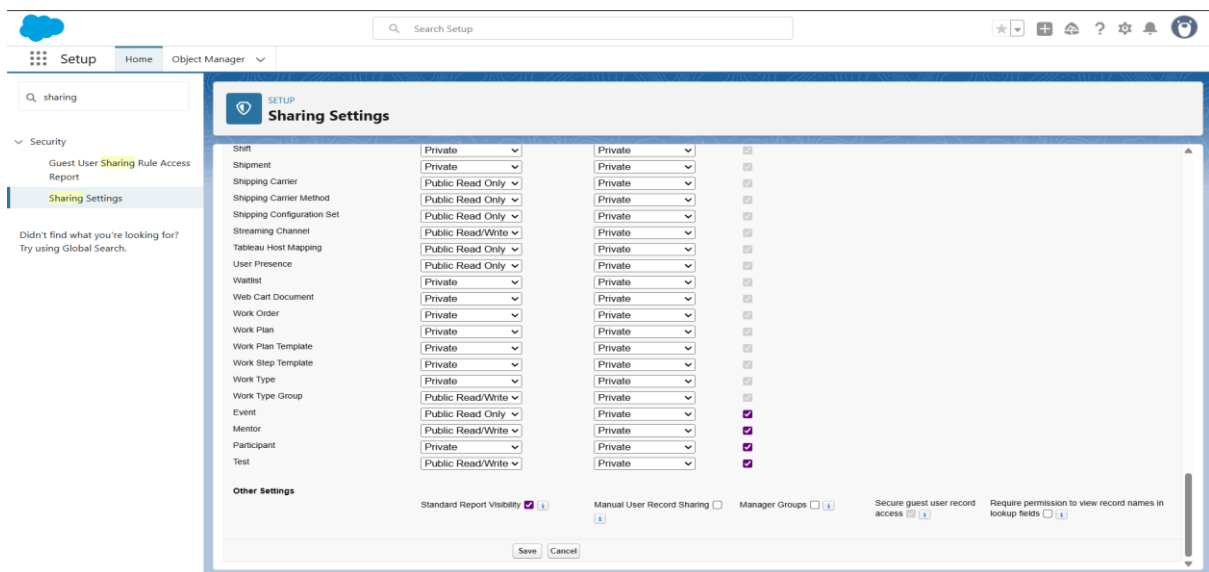
## 4. Dynamic Dashboards

- A **dynamic dashboard** was set up so each user (e.g., Event Organizer, Manager) can view reports based on their own data visibility.
- This ensures organizers only see participants and registrations for events they manage, while managers can see all events.



## 5. Sharing Settings

- Organization-Wide Defaults (OWD):
  - **Event\_\_c**: Public Read Only → everyone can view events.
  - **Registration\_\_c**: Private → only owners and managers can view.
  - **Participant\_\_c**: Controlled by parent (via registration).
- Sharing rules were added to allow Event Organizers to see all registrations for their events.



## 6. Audit Trail

- Salesforce **Setup Audit Trail** was enabled and reviewed.
- This ensures any configuration changes (like modifications to objects, workflows, or sharing rules) are logged.
- Admins can download audit logs for compliance and troubleshooting.

**View Setup Audit Trail**

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 9:41:25 AM PDT	vismithashethy24596@agenforce.com		Started default internal access update for Event from Public Read/Write to Public Read Only	Sharing Defaults	
9/26/2025, 9:41:23 AM PDT	vismithashethy24596@agenforce.com		Started Organization-Wide Defaults update	Sharing Defaults	
9/26/2025, 9:27:27 AM PDT	vismithashethy24596@agenforce.com		Changed Enable Reports setting for custom object Registration from off to on	Custom Objects	
9/26/2025, 9:27:27 AM PDT	vismithashethy24596@agenforce.com		Changed Track Activities setting for custom object Registration from off to on	Custom Objects	
9/26/2025, 9:27:27 AM PDT	vismithashethy24596@agenforce.com		Changed Search Indexing setting for custom object Registration from off to on	Custom Objects	
9/26/2025, 9:06:07 AM PDT	vismithashethy24596@agenforce.com		Deleted custom field Event from Events	Custom Objects	
9/26/2025, 9:05:34 AM PDT	vismithashethy24596@agenforce.com		Changed Event page layout Event Layout	Custom Objects	
9/26/2025, 9:05:34 AM PDT	vismithashethy24596@agenforce.com		Created custom lookup relationship Participant (Participant) on Events	Custom Objects	
9/26/2025, 9:04:24 AM PDT	vismithashethy24596@agenforce.com		Changed Event page layout Event Layout	Custom Objects	
9/26/2025, 9:04:24 AM PDT	vismithashethy24596@agenforce.com		Created custom lookup relationship Event (Event) on Events	Custom Objects	
9/26/2025, 8:56:27 AM PDT	vismithashethy24596@agenforce.com		Changed Enable Reports setting for custom object Participant from off to on	Custom Objects	
9/26/2025, 8:56:27 AM PDT	vismithashethy24596@agenforce.com		Changed Track Activities setting for custom object Participant from off to on	Custom Objects	
9/26/2025, 8:56:27 AM PDT	vismithashethy24596@agenforce.com		Changed Search Indexing setting for custom object Participant from off to on	Custom Objects	
9/26/2025, 8:55:56 AM PDT	vismithashethy24596@agenforce.com		Changed Enable Reports setting for custom object Event from off to on	Custom Objects	
9/26/2025, 8:55:56 AM PDT	vismithashethy24596@agenforce.com		Changed Track Activities setting for custom object Event from off to on	Custom Objects	
9/26/2025, 8:55:56 AM PDT	vismithashethy24596@agenforce.com		Changed Search Indexing setting for custom object Event from off to on	Custom Objects	
9/26/2025, 7:38:58 AM PDT	vismithashethy24596@agenforce.com		Changed registrationForm Lightning Web Component	Lightning Components	
9/26/2025, 7:38:58 AM PDT	vismithashethy24596@agenforce.com		Changed eventRegistrationContainer Lightning Web Component	Lightning Components	
9/26/2025, 7:38:58 AM PDT	vismithashethy24596@agenforce.com		Changed eventRegistration Lightning Web Component	Lightning Components	
9/26/2025, 7:38:58 AM PDT	vismithashethy24596@agenforce.com		Changed eventList Lightning Web Component	Lightning Components	

[Download setup audit trail for last six months \(Excel .csv file\)](#)

## Achievements in Phase 9

- Created custom reports and dashboards to visualize event performance.
- Implemented **dynamic dashboards** for role-based visibility.
- Strengthened app security with OWD, sharing rules, FLS, session timeouts, IP restrictions, and audit trails.
- Ensured the system provides actionable insights while maintaining robust security.