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.

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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.

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.

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.

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.
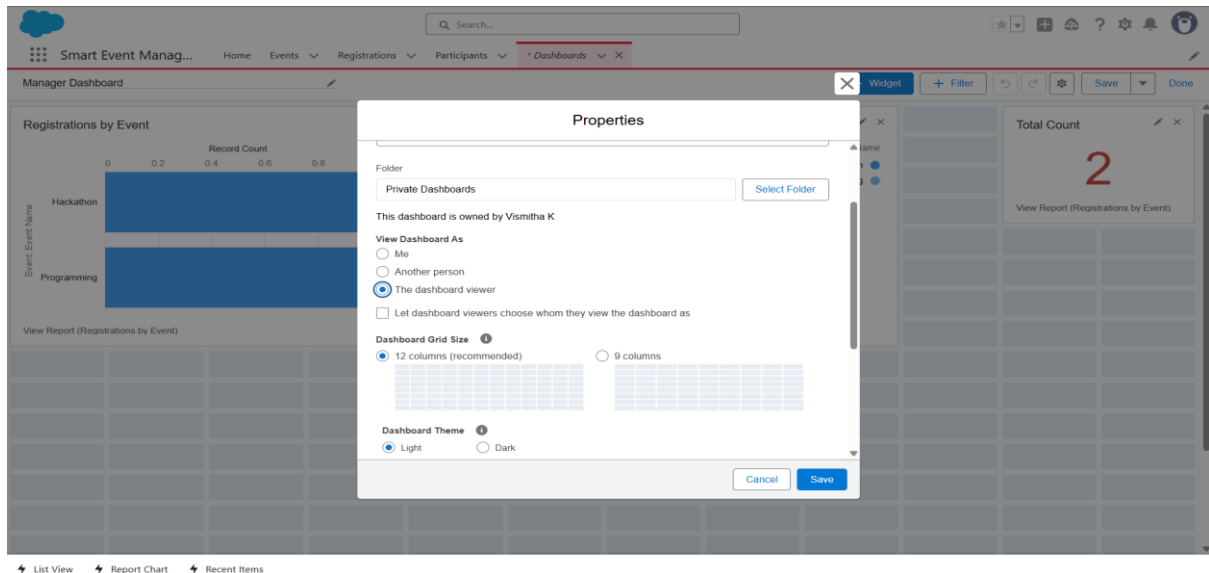
5. Sharing Settings

- Organization-Wide Defaults (OWD):

    o **Event__c:** Public Read Only → everyone can view events.

    o **Registration__c:** Private → only owners and managers can view.

    o **Participant__c:** Controlled by parent (via registration).

- Sharing rules were added to allow Event Organizers to see all registrations for their events.
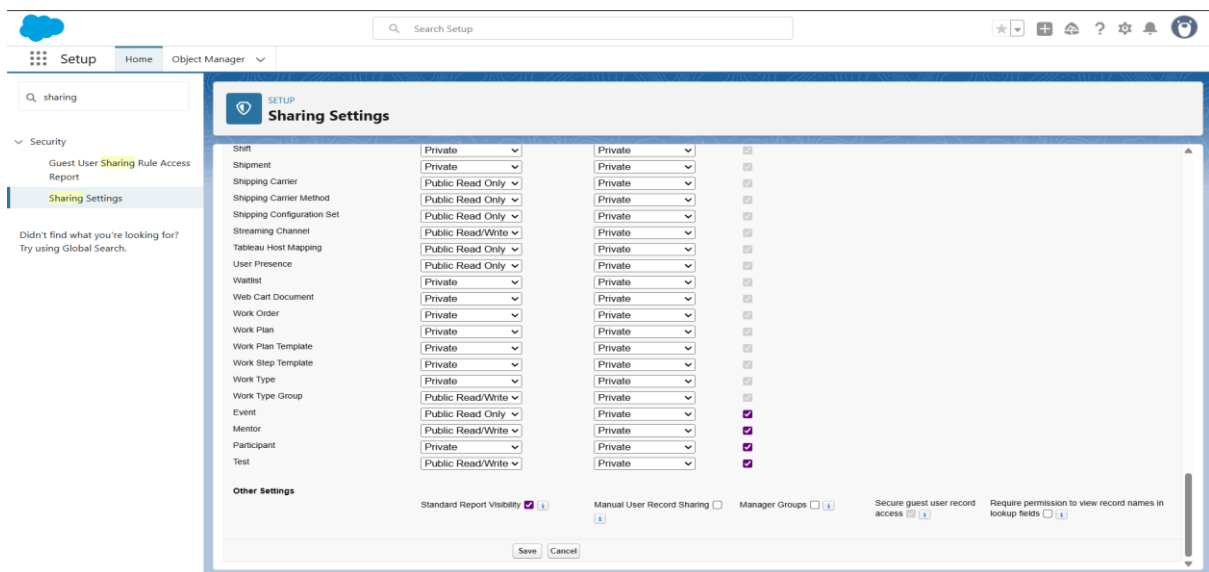
6. Audit Trail

- 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.

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.