

Phase 9: Reporting, Dashboards & Security Review

Goal :

Deliver **powerful reporting & analytics** (Reports, Dashboards, Dynamic Dashboards) and implement **robust security controls** (Sharing Settings, Field-Level Security, Session Settings, IP Ranges, Audit Trail) to ensure data is both actionable and protected.

1. Reports (Tabular, Summary, Matrix, Joined)

- **Tabular Reports:**

- Student List Report (Basic student details)
- Attendance List Report (Daily/Monthly attendance)

- **Summary Reports:**

- Class-wise Student Count
- Attendance Percentage by Class
- Grade Distribution Summary

- **Matrix Reports:**

- Attendance Matrix (Rows = Classes, Columns = Months)
- Grade Performance Matrix (Rows = Subjects, Columns = Terms)

- **Joined Reports:**

- Student + Attendance + Grades combined view for holistic performance analysis
- Course Enrollment + Completion Rate joined report

The screenshot shows a Salesforce Lightning interface with a report titled "Report: Students Student Enrollment Report". The report displays a table of student records with the following data:

Total Records	5		
Status	Student Name	Email	Phone
Applied (5)	gavvalayyashnavi@gmail.com	9602138859	
	gavvalayyashnavi014@gmail.com	9697138859	
	224gt1a2219@sent.ac.in	9014670799	
	john.Dee	9602138859	
	vaishnavi	9602138859	

At the bottom of the report, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".

Report Name	Description	Folder	Created By	Created On	Subscribed
Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Unblended Dashboard Reports Summer '24	Automated Process	9/19/2023, 7:05 AM	
Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Unblended Dashboard Reports Spring '24	Automated Process	9/19/2023, 7:05 AM	
Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Unblended Dashboard Reports Spring '24	Automated Process	9/19/2023, 7:05 AM	
Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Unblended Dashboard Reports Spring '24	Automated Process	9/19/2023, 7:05 AM	
Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Unblended Dashboard Reports Summer '24	Automated Process	9/19/2023, 7:05 AM	
Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Unblended Dashboard Reports Spring '24	Automated Process	9/19/2023, 7:05 AM	

2. Report Types

- Student Report Type:** Includes student personal details, contact info
- Attendance Report Type:** Links Student → Attendance records
- Grades Report Type:** Links Student → Grades with term/subject info
- Courses Report Type:** Links Student → Courses enrolled, status, teacher details

Details

Display Label: student attendance report
 API Name: student_attendance_report
 Description: This is the student attendance report.
 Created By: Gayvala Vyshnavi, 12/1/25, 12:32 PM
 Store in Category: other
 Deployment: Deployed
 Modified By: Gayvala Vyshnavi, 12/1/25, 12:32 PM

Fields

Source Object	Included Fields
Students	20
Attendances	11

Object Relationships

Students (A) with at least one related record from Attendances (B)

3. Dashboards

- Student Overview Dashboard:** Total Students, New Admissions, Dropouts
- Attendance Dashboard:** Present %, Absent %, Class-wise charts
- Grades Dashboard:** Average Grades per Class, Top Performers, At-Risk Students
- Course Dashboard:** Enrolment Trends, Most Popular Courses

Student: Student Name	Email	Phone
Gayvala Vyshnavi	gayvalavyshnavi0944@gmail.com	9802138869
John Doe	gayvalavyshnavi0944@gmail.com	9802138869
Larkin	224112310@gmail.com.in	9811057099
Vishnavi	gayvalavyshnavi0944@gmail.com	9802138869
Vyshnavi	gayvalavyshnavi0944@gmail.com	9802138869

4. Dynamic Dashboards

- Configured dashboards to **run as logged-in user** so each Teacher sees only their class data, Principal sees their school data, and Admin sees all data.
- Applied **dashboard filters** (Class, Term, Subject) for real-time drill-down.

The screenshot shows a dynamic dashboard titled "Institute Overview Dashboard". At the top, there are navigation tabs: Students, Courses, Enrollments, Attendances, Reports, and Dashboards. Below the tabs is a search bar and a toolbar with various icons. The main area features a "Student Enrollment Report" card with a table of student data. The table includes columns for Student Name, Email, and Phone. The data shows several entries, including Gaurav Vyshnavi, John Doe, Lekha, Vaishnavi, and Vyshnavi. Each row has a "View Report" link. The dashboard also contains a large, empty grid area for other reports.

5. Sharing Settings:

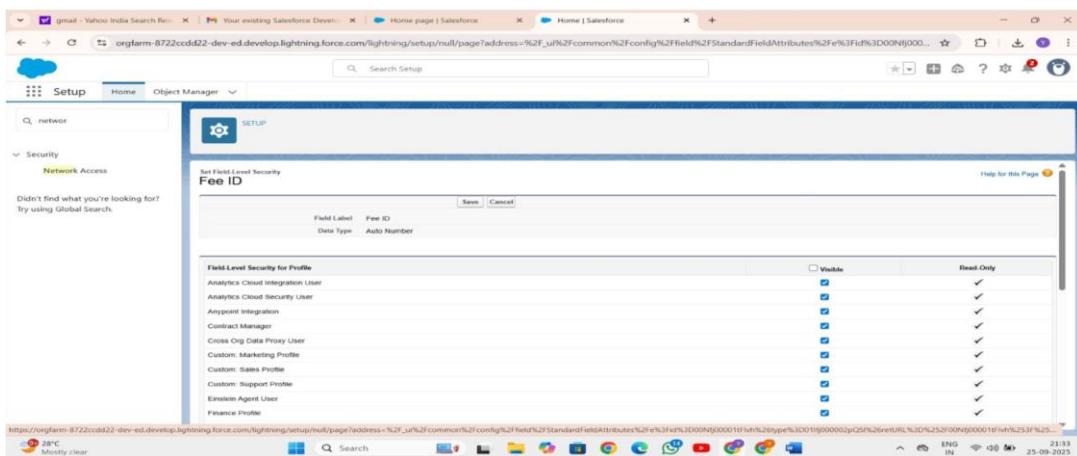
- Organization-Wide Defaults (OWD):**
 - Students, Attendance, Grades = Private
 - Courses=ControlledbyParent

The screenshots show the "Sharing Settings" page in the Salesforce setup. The top screenshot displays a list of sharing rules across various objects like User, Group, Work Order, etc., with access levels set to "Private" or "Controlled by Parent". The bottom screenshot shows a more detailed view of specific sharing rules for Attendance, Course, Fee, Grade, and Student objects, defining who can edit or delete them based on criteria like "Owner in All Internal Users".

- **Role Hierarchy:**
 - Admin > Principal > Teacher > Student
- **Sharing Rules:**
 - Criteria-based rules to share records with Teacher Groups based on Class/Section
 - Owner-based sharing for Principals to access all data under their school

6. Field-Level Security

- **Sensitive Fields Restricted:**
 - SSN, Parent Contact Info → Visible to Admin & Principal only
 - Fee Details → Visible to Admin only
 - Grades → Read-Only for Teachers, Visible to Principal/Admin
- **Profiles Configured:** Admin, Principal, Teacher, Student with tailored field visibility



7. Session Settings

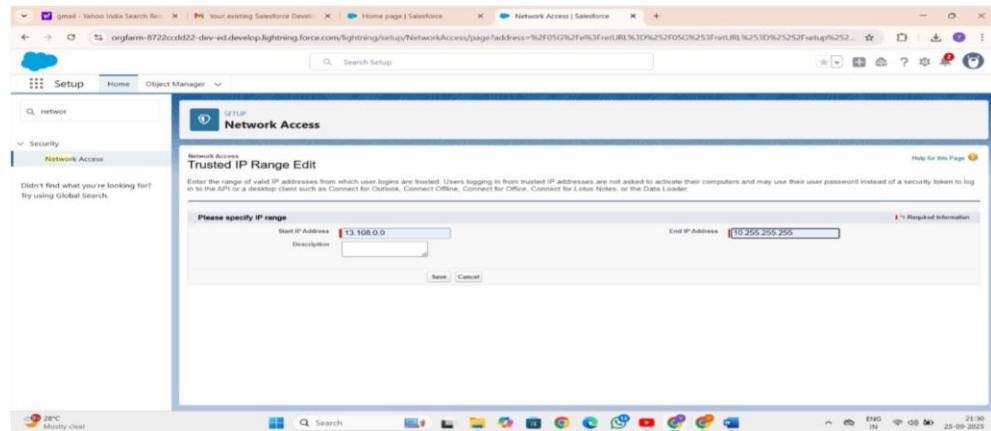
- **Session Timeout:** 30 minutes
- **Logout on Timeout:** Enabled
- **Lock Session to IP/Domain:** Enabled
- **Clickjack & CSRF Protection:** Enabled
- **HTTPS Required:** Enforced for secure communication

8. Login IP Ranges

- **Network Access (Org-Wide):** Added school's LAN/Wi-Fi IP range

- **Profile-Specific Ranges:**

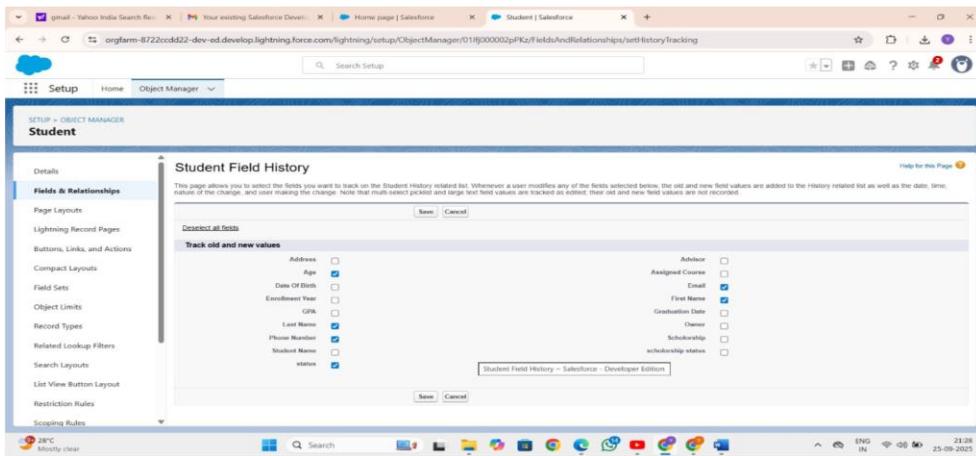
- Teachers: Allowed only from school network
- Admin: Allowed from office network + VPN
- Students: Allowed from broader IP range (school + home if needed)



9. Audit Trail

- **Setup Audit Trail:** Enabled and reviewed for changes in roles, profiles, and settings
- **Field History Tracking:**
 - Tracked Fields: Student Status, Assigned Teacher, Grade Changes, Attendance Updates
- **Login History:** Monitored failed logins and suspicious attempts

Date	User	Source Namespace	Profile	Action	Section	Delegate User
9/29/2023, 6:44:47 AM PDT	verasolohatthat5850@agentforce.com			Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Authentication_for_students) for Student_API_Named_Credential	Named Credentials	
9/29/2023, 6:44:47 AM PDT	verasolohatthat5850@agentforce.com			Created a new parameter: UI (Parameter Type: UI, Parameter Value: https://api.example.com) for Student_API_Named_Credential	Named Credentials	
9/29/2023, 6:43:41 AM PDT	verasolohatthat5850@agentforce.com			Created a new named credential: Student_API_Named_Credential	Named Credentials	
9/29/2023, 6:43:41 AM PDT	verasolohatthat5850@agentforce.com			Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for Authentication_for_students	External Credentials	
9/29/2023, 6:43:41 AM PDT	verasolohatthat5850@agentforce.com			Created a new external credential: Authentication_for_students	External Credentials	
9/29/2023, 2:51:39 AM PDT	verasolohatthat5850@agentforce.com			Changed tabs of custom app Student Management	Custom Apps	
9/29/2023, 2:49:55 AM PDT	verasolohatthat5850@agentforce.com			Created custom Lightning Page tab: Home2 page	Custom Tabs	
9/29/2023, 2:48:11 AM PDT	verasolohatthat5850@agentforce.com			Changed tabs of custom app Appirents	Custom Apps	
9/29/2023, 2:48:10 AM PDT	verasolohatthat5850@agentforce.com			Created custom Lightning Page tab: Home page	Custom Tabs	
9/29/2023, 2:47:28 AM PDT	verasolohatthat5850@agentforce.com			Created Lightning Page: Home page	Lightning Pages	
9/29/2023, 2:43:17 AM PDT	verasolohatthat5850@agentforce.com			Reset standard button override: Tab	Standard Buttons and Links	



Identity	
	Setup
Identity	
Login Flows	
Login History	
Security	
Login Access Policies	
Didn't find what you're looking for? Try using Global Search.	

Login History												Help for this Page	
Download Options												Help for this Page	
Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL	HTTP Method
Z24g1x32h02@salesforce.com	11/10/2025, 10:38:16 PM PST	223.187.22.203	India	Application	Success	Edge 142	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	11/10/2025, 9:09:21 PM PST	27.59.251.233	India	Application	Success	Edge 142	Windows	Browser	N/A	N/A	N/A	login.salesforce.com	POST
spic.kt6kde6SeI@hyphen.sxsalesforce.com	11/23/2025, 2:20:35 PM PST	62.1.139.45	United States	Remote Access	Success	Unknown 2.0	Unknown	orgfarm_app_1	N/A	N/A	N/A	login.salesforce.com	POST
Z24g1x32h02@salesforce.com	11/10/2025, 7:47:41 PM PST	223.187.38.26	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	10/19/2025, 4:03:26 AM PDT	223.185.79.210	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	10/19/2025, 8:06:29 PM PDT	223.185.79.210	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	10/19/2025, 1:14:22 AM PDT	223.185.86.202	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	10/19/2025, 8:09:21 PM PDT	223.185.86.202	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST
Z24g1x32h02@salesforce.com	9/24/2025, 10:37:17 PM PDT	106.217.237.135	India	Application	Success	Edge 141	Windows	Browser	N/A	N/A	N/A	orgfarm-01a15847d9-dev-ed-develop.my.salesforce.com	POST

