

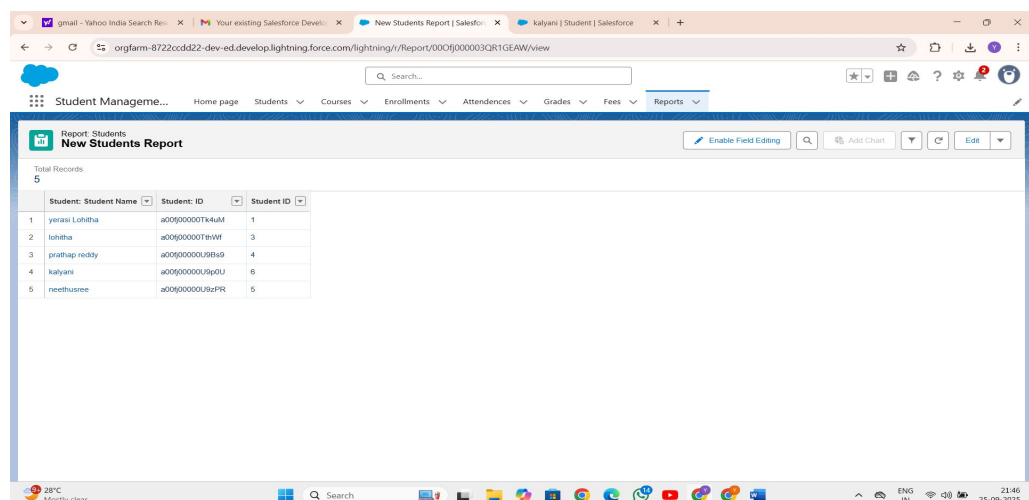
Phase 9: Reporting, Dashboards & Security Review

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.

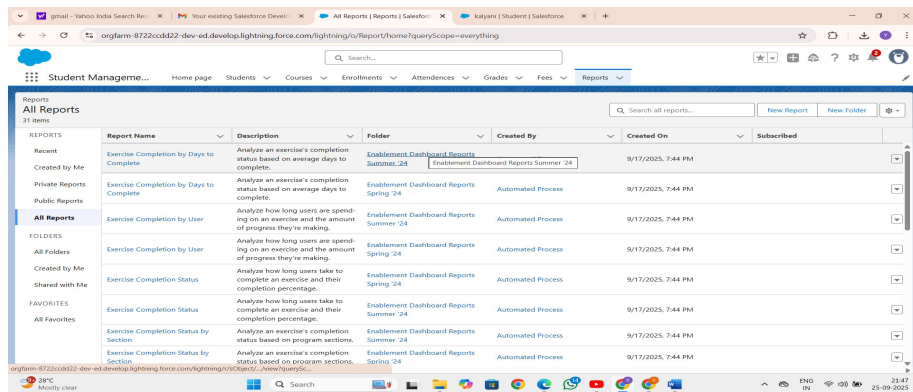
1. Reports (Tabular, Summary, Matrix, Joined)

- **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



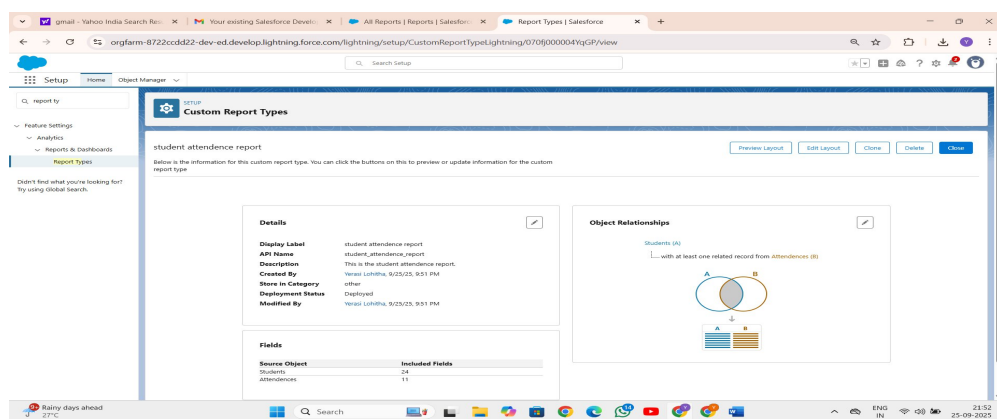
The screenshot displays a Salesforce report interface. The report is titled 'New Students Report' and shows a table with 5 records. The table columns are 'Student: Student Name', 'Student: ID', and 'Student ID'. The data is as follows:

| | Student: Student Name | Student: ID | Student ID |
|---|-----------------------|----------------|------------|
| 1 | yeraai Lohitha | a009000007k4uM | 1 |
| 2 | lohitha | a009000007eWt | 3 |
| 3 | prathap reddy | a009000009Bt9 | 4 |
| 4 | kalyani | a009000009p0U | 6 |
| 5 | neethusree | a009000009zPR | 5 |



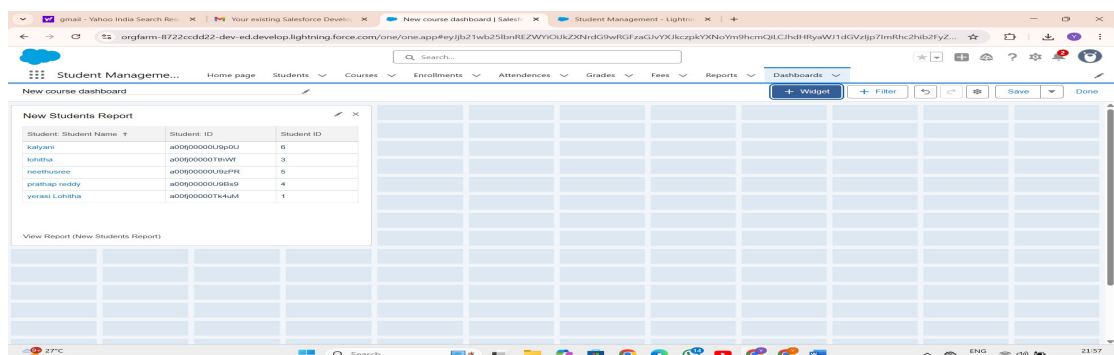
2. Report Types

- **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



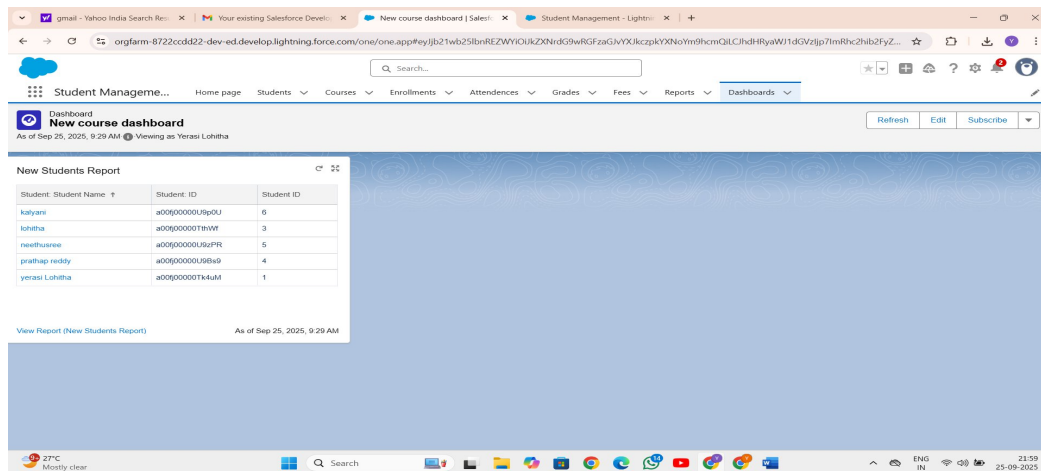
3. Dashboards

- **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



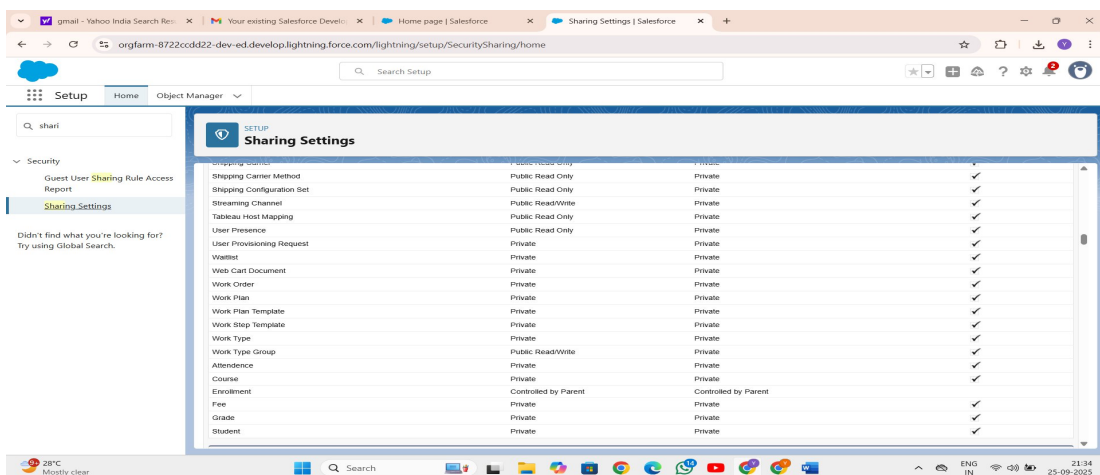
4. Dynamic Dashboards

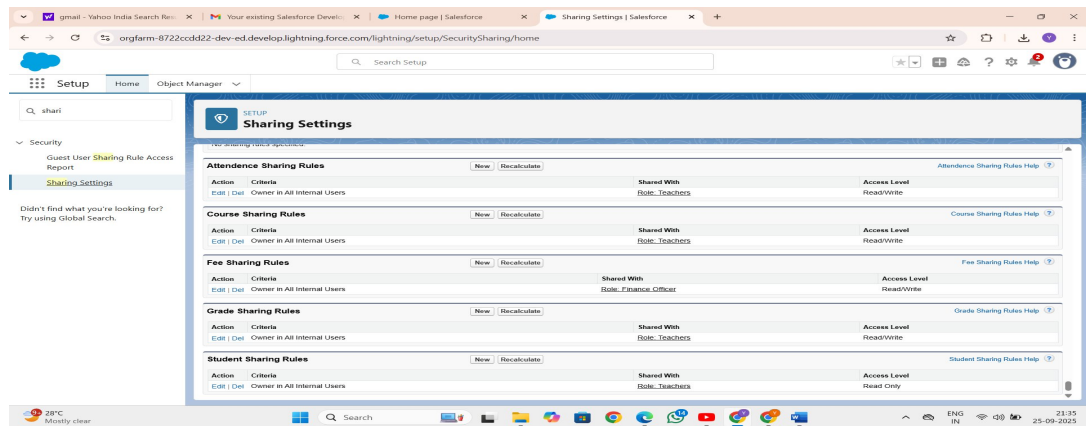
- Configured dashboards to **run as logged-in user** so each Teacher sees only their class data, Principal sees their school data, and Admin sees all data.
- Applied **dashboard filters** (Class, Term, Subject) for real-time drill-down.



5. Sharing Settings

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

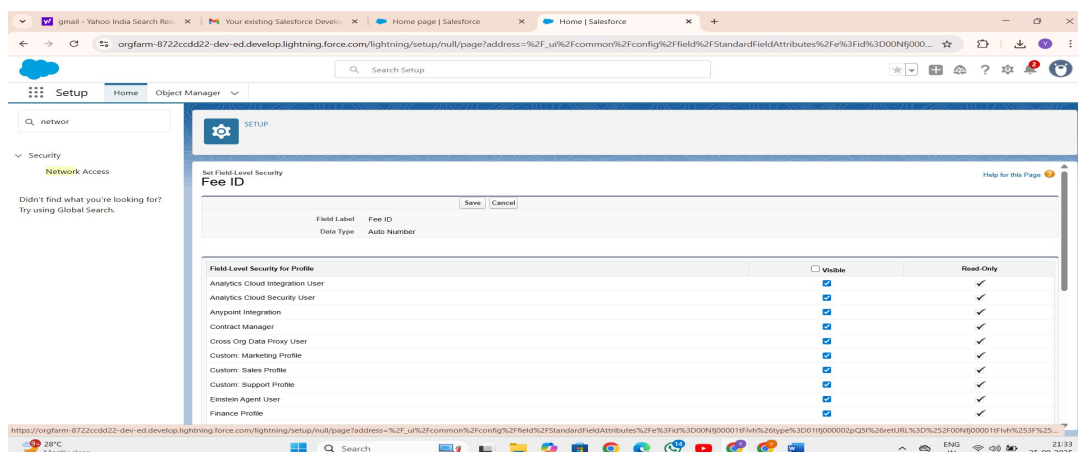




- **Role Hierarchy:**
 - Admin > Principal > Teacher > Student
- **Sharing Rules:**
 - Criteria-based rules to share records with Teacher Groups based on Class/Section
 - Owner-based sharing for Principals to access all data under their school

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



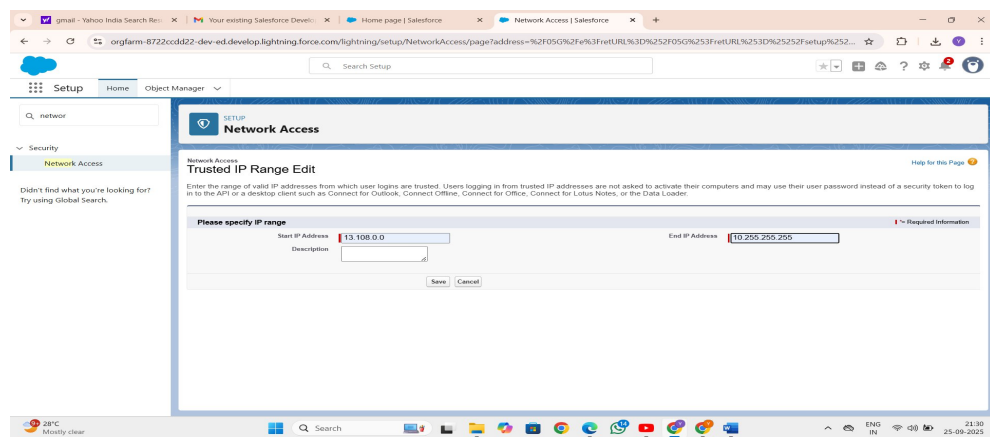
7. Session Settings

- **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

Screenshot of the Salesforce Setup page showing the View Setup Audit Trail interface. The page displays a list of recent setup changes, including creating new parameters, named credentials, and custom tabs. The interface includes a search bar, a list of changes with columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The changes are listed in a table format, showing the date and time of the change, the user who made the change, the source namespace prefix, the action taken, the section affected, and the delegate user.

| Date | User | Source Namespace Prefix | Action | Section | Delegate User |
|---------------------------|--------------------------------|-------------------------|---|----------------------------|---------------|
| 9/25/2025, 6:44:47 AM PDT | yerasikotha8565@agentforce.com | | Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Authentication_for_students) for Student_API_Named_Credential | Named Credentials | |
| 9/25/2025, 6:44:47 AM PDT | yerasikotha8565@agentforce.com | | Created a new parameter: Uri (Parameter Type: Uri, Parameter Value: https://api.example.com) for Student_API_Named_Credential | Named Credentials | |
| 9/25/2025, 6:44:47 AM PDT | yerasikotha8565@agentforce.com | | Created a new named credential: Student_API_Named_Credential | Named Credentials | |
| 9/25/2025, 6:43:41 AM PDT | yerasikotha8565@agentforce.com | | Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for Authentication_for_students | External Credentials | |
| 9/25/2025, 6:43:41 AM PDT | yerasikotha8565@agentforce.com | | Created a new external credential: Authentication_for_students | External Credentials | |
| 9/25/2025, 2:51:39 AM PDT | yerasikotha8565@agentforce.com | | Changed tabs of custom app Student Management | Custom Apps | |
| 9/25/2025, 2:49:55 AM PDT | yerasikotha8565@agentforce.com | | Created custom Lightning Page tab: Home2 page | Custom Tabs | |
| 9/25/2025, 2:48:11 AM PDT | yerasikotha8565@agentforce.com | | Changed tabs of custom app Approvals | Custom Apps | |
| 9/25/2025, 2:48:10 AM PDT | yerasikotha8565@agentforce.com | | Created custom Lightning Page tab: Home page | Custom Tabs | |
| 9/25/2025, 2:47:28 AM PDT | yerasikotha8565@agentforce.com | | Created Lightning Page: Home page | Lightning Pages | |
| 9/25/2025, 2:43:17 AM PDT | yerasikotha8565@agentforce.com | | Reset standard button override: Tab | Standard Buttons and Links | |

Screenshot of the Salesforce Setup page showing the Student Field History interface. The page displays a list of fields related to the Student object, allowing users to track changes to these fields. The interface includes a search bar, a list of fields with checkboxes to select them for tracking, and a 'Save' button. The fields are listed in a table format, showing the field name and a checkbox to select it.

| Field Name | Select |
|--------------------|-------------------------------------|
| Address | <input type="checkbox"/> |
| Age | <input checked="" type="checkbox"/> |
| Date Of Birth | <input type="checkbox"/> |
| Enrollment Year | <input type="checkbox"/> |
| GPA | <input type="checkbox"/> |
| Last Name | <input checked="" type="checkbox"/> |
| Phone Number | <input checked="" type="checkbox"/> |
| Student Name | <input type="checkbox"/> |
| Status | <input checked="" type="checkbox"/> |
| Advisor | <input type="checkbox"/> |
| Assigned Course | <input type="checkbox"/> |
| Email | <input checked="" type="checkbox"/> |
| First Name | <input checked="" type="checkbox"/> |
| Graduation Date | <input type="checkbox"/> |
| Owner | <input type="checkbox"/> |
| Scholarship | <input type="checkbox"/> |
| Scholarship status | <input type="checkbox"/> |

Screenshot of the Salesforce Setup page showing the Login History interface. The page displays a list of login attempts, including the username, login time, source IP, location, login type, status, browser, platform, application, client version, API type, API version, login URL, and HTTP method. The interface includes a search bar, a list of login attempts with checkboxes to select them for download, and a 'Download Now' button. The login attempts are listed in a table format, showing the login details and a checkbox to select it.

| Username | Login Time | Source IP | Location | Login Type | Status | Browser | Platform | Application | Client Version | API Type | API Version | Login URL | HTTP Method |
|--------------------------------|---------------------------|----------------|----------|----------------------|---------|------------|------------|----------------|----------------|----------|-------------|----------------------|-------------|
| yerasikotha8565@agentforce.com | 9/25/2025, 8:58:24 AM PDT | 136.232.226.58 | India | Application | Success | Chrome 140 | Windows 10 | Browser | N/A | N/A | N/A | login.salesforce.com | POST |
| yerasikotha8565@agentforce.com | 9/25/2025, 6:21:49 AM PDT | 136.232.226.58 | India | Application | Success | Chrome 140 | Windows 10 | Browser | N/A | N/A | N/A | login.salesforce.com | POST |
| yerasikotha8565@agentforce.com | 9/25/2025, 2:25:02 AM PDT | 136.232.226.58 | India | Application | Success | Chrome 140 | Windows 10 | Browser | N/A | N/A | N/A | login.salesforce.com | POST |
| yerasikotha8565@agentforce.com | 9/25/2025, 2:06:50 AM PDT | 136.232.226.58 | India | Remote Access 2.0 | Success | Unknown | Unknown | Salesforce CLI | N/A | N/A | N/A | login.salesforce.com | POST |
| yerasikotha8565@agentforce.com | 9/25/2025, 2:06:46 AM PDT | 136.232.226.58 | India | Remote Access Client | Success | Edge 140 | Windows 10 | Browser | N/A | N/A | N/A | login.salesforce.com | GET |
| yerasikotha8565@agentforce.com | 9/25/2025, 1:35:25 AM PDT | 136.232.226.58 | India | Remote Access 2.0 | Success | Unknown | Unknown | Salesforce CLI | N/A | N/A | N/A | login.salesforce.com | POST |