

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 web application interface for 'Institute Management'. The main content area shows a 'Report: Students' titled 'Student Enrollment Report'. The table lists 5 records with columns for Student Name, Email, and Phone. The interface includes a search bar, navigation tabs, and a status filter.

| Status | Student Name | Email | Phone |
|-------------|------------------|-------------------------------|------------|
| Applied (5) | vyshnavi | gavvalavyshnavi2014@gmail.com | 9502138859 |
| | Lavanya Vyshnavi | gavvalavyshnavi2014@gmail.com | 9502138859 |
| | Larkin | 22fgta32b6@sevit.ac.in | 6014670299 |
| | John Doe | gavvalavyshnavi2014@gmail.com | 9502138859 |
| | vaishnavi | gavvalavyshnavi2014@gmail.com | 9502138859 |
| Subtotal | | | |
| Total (5) | | | |

Row Counts: ☐ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

| REPORTS | Report Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------|---|---|---|-------------------|--------------------|------------|
| Recent | Exercise Completion by Days to Complete | Analyze an exercise's completion status based on average days to complete. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 7:05 AM | |
| Created by Me | Exercise Completion by Days to Complete | Analyze an exercise's completion status based on average days to complete. | Enrollment Dashboard Reports Spring '24 | Automated Process | 9/19/2025, 7:05 AM | |
| Private Reports | Exercise Completion by Days to Complete | Analyze an exercise's completion status based on average days to complete. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 7:05 AM | |
| Public Reports | Exercise Completion by User | Analyze how long users are spending on an exercise and the amount of progress they're making. | Enrollment Dashboard Reports Spring '24 | Automated Process | 9/19/2025, 7:05 AM | |
| All Reports | Exercise Completion by User | Analyze how long users are spending on an exercise and the amount of progress they're making. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 7:05 AM | |
| FOLDERS | Exercise Completion by User | Analyze how long users are spending on an exercise and the amount of progress they're making. | Enrollment Dashboard Reports Spring '24 | Automated Process | 9/19/2025, 7:05 AM | |
| All folders | Exercise Completion Status | Analyze how long users take to complete an exercise and their completion percentage. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 7:05 AM | |
| Created by Me | Exercise Completion Status | Analyze how long users take to complete an exercise and their completion percentage. | Enrollment Dashboard Reports Spring '24 | Automated Process | 9/19/2025, 7:05 AM | |
| Shared with Me | Exercise Completion Status by Section | Analyze an exercise's completion status based on program sections. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 7:05 AM | |
| FAVORITES | Exercise Completion Status by Section | Analyze an exercise's completion status based on program sections. | Enrollment Dashboard Reports Spring '24 | Automated Process | 9/19/2025, 7:05 AM | |
| All Favorites | Exercise Completion Status by Section | Analyze an exercise's completion status based on program sections. | Enrollment Dashboard Reports Summer '24 | Automated Process | 9/19/2025, 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 | Object Relationships |
|--|--|
| Display Label student attendance report API Name student_attendance_report Description This is the student attendance report. Created By Gavvala Vyshnavi, 12/1/25, 12:32 PM Store in Cate... other Deployment ... Deployed Modified By Gavvala Vyshnavi, 12/1/25, 12:32 PM | Object Relationships Students (A) ... with at least one related record from Attendance (B) |

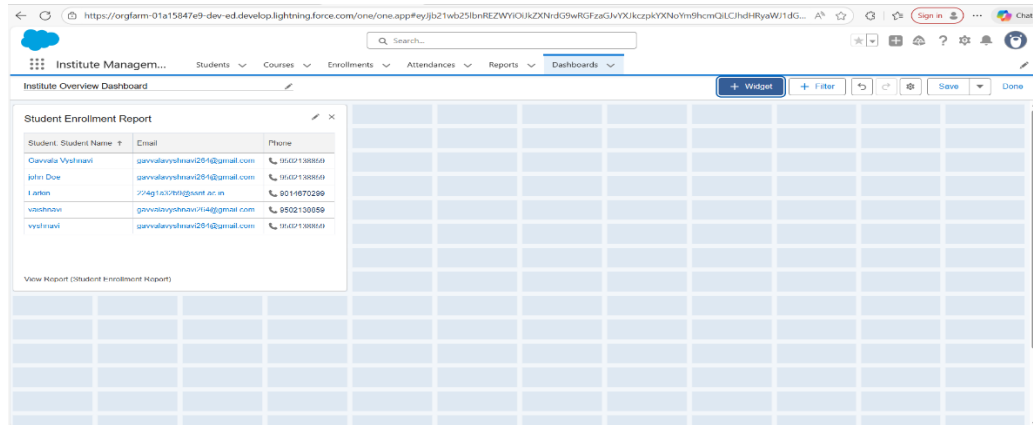
3. Dashboards

- **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 Name | Email | Phone |
|------------------|------------------------------|------------|
| Gavvala Vyshnavi | gavvalavyshnavi094@gmail.com | 9502138859 |
| John Doe | gavvalavyshnavi094@gmail.com | 9502138859 |
| Liam | 224p4u35d@gmail.com | 9502138859 |
| Vishnavi | gavvalavyshnavi094@gmail.com | 9502138859 |
| Vyshnavi | gavvalavyshnavi094@gmail.com | 9502138859 |

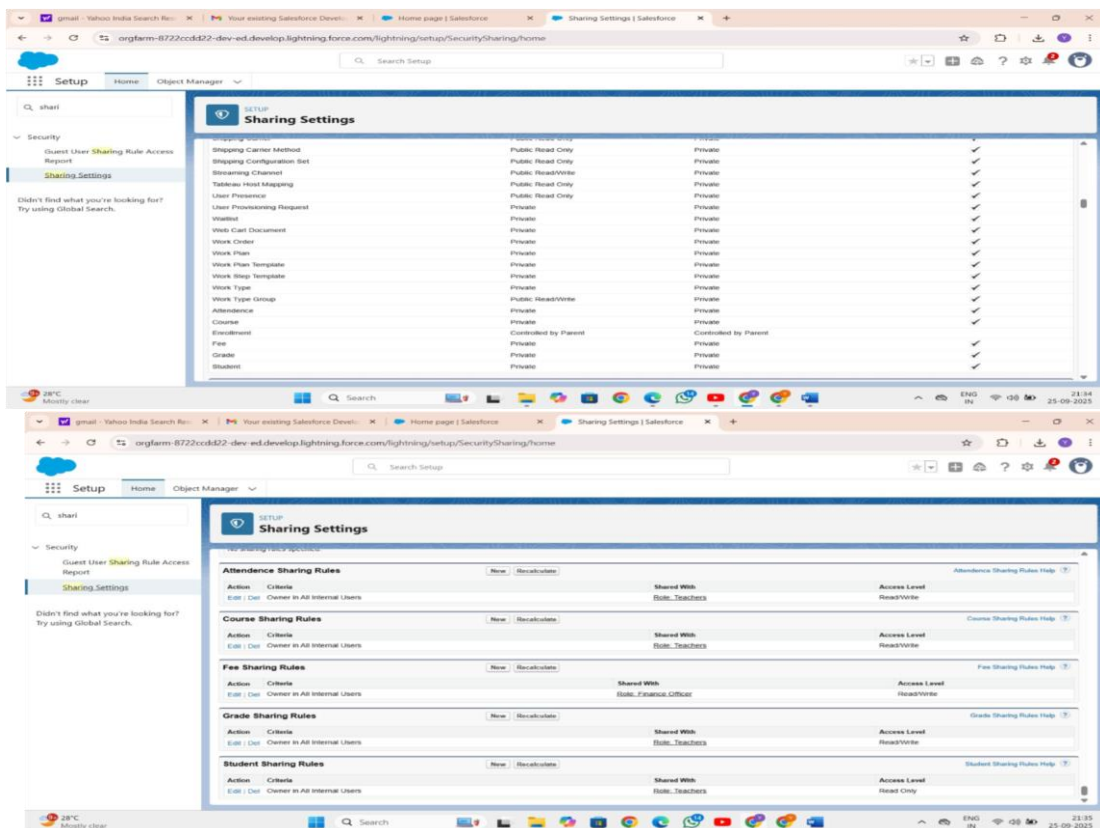
4. Dynamic Dashboards

- 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:

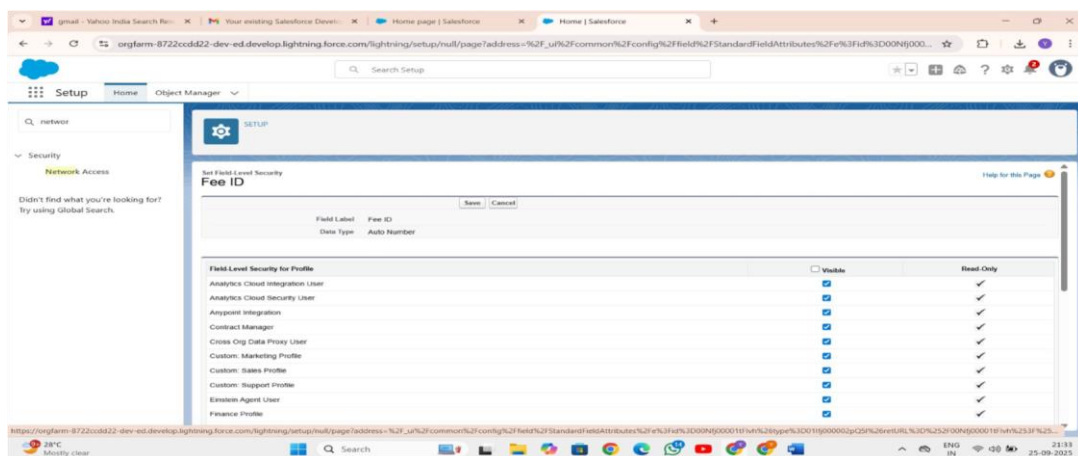
- **Organization-Wide Defaults (OWD):**
 - Students, Attendance, Grades = Private
 - Courses=ControlledbyParent



- **RoleHierarchy:**
 - 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

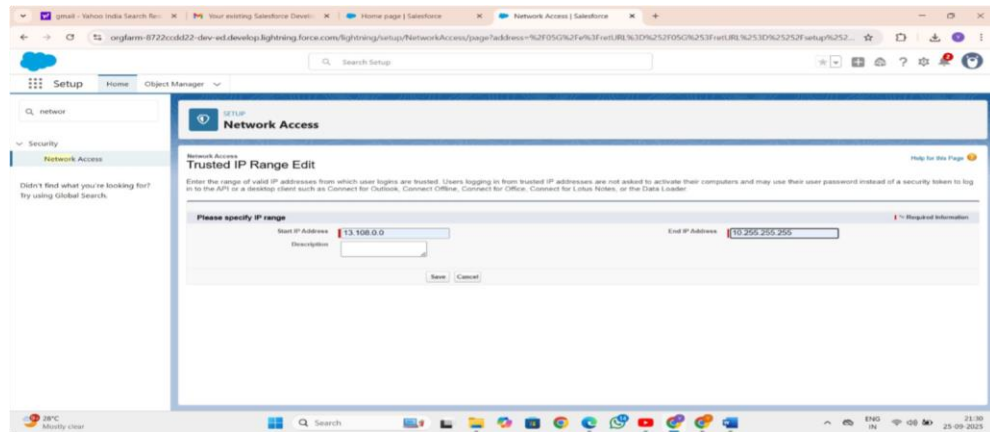
- **Session Timeout:** 30 minutes
- **Logout on Timeout:** Enabled
- **Lock Session to IP/Domain:** Enabled
- **Clickjack & CSRF Protection:** Enabled
- **HTTPS Required:** Enforced for secure communication

8. Login IP Ranges

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

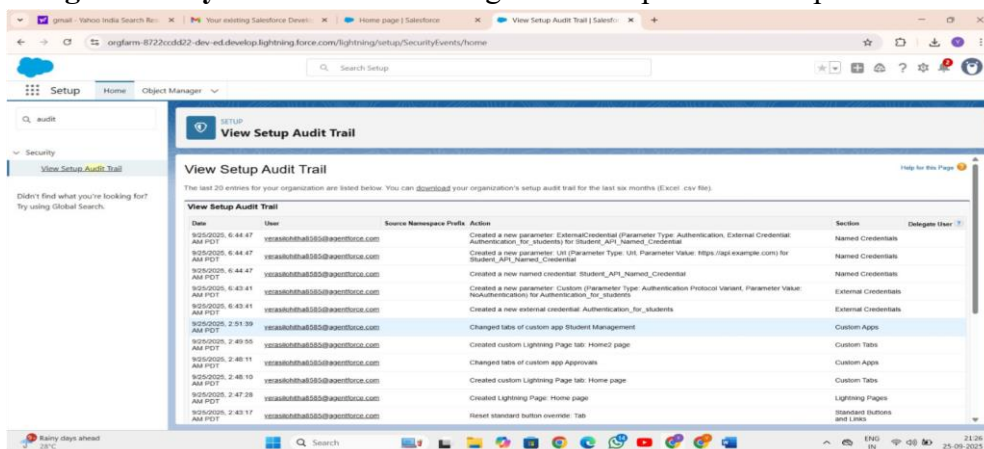
- **Profile-Specific Ranges:**

- 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 for the 'Student' object. The page title is 'Student Field History'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Student Field History' page, which allows users to track changes to the Student object fields. The page includes a 'Track old and new values' section with a list of fields and checkboxes to select which fields to track. The fields listed are: Address, Age, Date of Birth, Enrollment Year, GPA, Last Name, Phone Number, Student Name, Status, Advisor, Assigned Course, Email, First Name, Graduation Date, Gender, Scholarship, and Scholarship Status. The page also includes a 'Download' button and a 'Cancel' button.

Screenshot of the Salesforce Setup page for the 'Login History' object. The page title is 'Login History'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Login History' page, which allows users to track login activity for the Login History object. The page includes a 'Download' button and a 'Cancel' button. Below the download options, there is a table showing login history records.

| Username | Login Time | Source IP | Location | Login Type | Status | Browser | Platform | Application | Client Version | API Type | API Version | Login URL | HTTP Method |
|---------------------------------------|-----------------------------|-----------------|---------------|---------------|---------|----------|------------|---------------|----------------|----------|-------------|---|-------------|
| 224s1a326262@my.salesforce.com | 11/22/2025, 10:36:16 PM PST | 223.187.22.203 | India | Application | Success | Edge 142 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 11/22/2025, 9:09:21 PM PST | 27.69.261.233 | India | Application | Success | Edge 142 | Windows 10 | Browser | N/A | N/A | N/A | login.salesforce.com | POST |
| api:6380edafad@orgfarm.salesforce.com | 11/22/2025, 2:20:35 PM PST | 52.1.139.45 | United States | Remote Access | Success | Unknown | Unknown | orgfarm_app_1 | N/A | N/A | N/A | login.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/25/2025, 7:47:41 PM PDT | 223.187.38.204 | India | Application | Success | Edge 141 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/15/2025, 4:03:28 AM PDT | 223.185.70.210 | India | Application | Success | Edge 141 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/15/2025, 8:06:29 PM PDT | 223.185.70.210 | India | Application | Success | Edge 141 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/10/2025, 1:14:22 AM PDT | 223.185.86.202 | India | Application | Success | Edge 141 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/17/2025, 8:09:21 PM PDT | 223.185.86.202 | India | Application | Success | Edge 141 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |
| 224s1a326262@my.salesforce.com | 10/20/2025, 10:37:17 PM PDT | 106.217.237.135 | India | Application | Success | Edge 140 | Windows 10 | Browser | N/A | N/A | N/A | orgfarm-01a15847e9-dev-ed.develop.my.salesforce.com | POST |

