

Phase 9: Reporting, Dashboards & Security Review

Objective

To provide **real-time insights** into event registrations, attendee feedback, and event performance using Salesforce **Reports & Dashboards**, while ensuring **data security** and **role-based access control** through Profiles, Permission Sets, and Field-Level Security (FLS).

Reports Implemented

Report Name	Type	Purpose
Event Capacity vs Registrations	Summary Report	Track how many attendees have registered per event; identify events nearing full capacity
Department-wise Registrations	Matrix Report	Analyze registration trends across different departments
Event Feedback Summary	Summary Report	Monitor attendee ratings and comments for each event
Upcoming Events List	Tabular Report	Quick view of scheduled events for admins and coordinators
Registration Status Summary	Summary Report	Identify confirmed, pending, or canceled registrations

Dashboards Implemented

Dashboard Name	Component Type	Purpose
Event Overview Dashboard	Bar & Donut Charts	Visualizes registration counts, capacity, and department-wise distribution
Department Insights Dashboard	Lightning Table & Charts	Provides insights into feedback ratings, registrations, and departmental participation

Dashboard Name	Component Type	Purpose
Upcoming Events Dashboard	Calendar & Summary	Quick glance at upcoming events and attendee counts
Registration Status Dashboard	Donut & Bar Charts	Displays confirmed, pending, and canceled registrations per event

Role-Based Visibility:

- **Event Admin:** Full access to all reports and dashboards.
- **User (Attendee):** Limited access; can only view their own registration and feedback metrics.

Security Review

1. Profiles & Roles

Profile	Access
Event Admin	Full access to all objects, reports, dashboards, and flows
Event Coordinator / Department Head	Manage attendees, view related events and reports
User (Attendee)	Can register and submit feedback only; no access to other attendees or dashboards

2. Field-Level Security (FLS)

- Sensitive fields (e.g., email, phone, registration status) are restricted based on role.
- Non-relevant fields hidden for lower-level roles to prevent unauthorized access.

3. Tab & Record Access

- Controlled through **Profiles & Permission Sets**:
 - Event Admin: All tabs visible.
 - Attendee: Only “Event Registration” and “Feedback” tabs visible.
 - Event Coordinator: Access to Event and Attendee tabs; no modification of admin-only fields.

4. Validation & Data Integrity

- Validation rules ensure:
 - Emails are properly formatted.
 - Phone numbers are 10 digits.
 - Event capacity and registration rules are enforced.
- Ensures reliable, accurate data for reporting and dashboards.

Benefits

- Provides **data-driven insights** for decision-making and event planning.
- Enhances **attendee engagement** with trend analysis (e.g., feedback, departmental participation).
- Strengthens **security and compliance** through role-based access and FLS.
- Ensures **authorized access** only, protecting sensitive registration and feedback data.