



## Phase 9 Reporting, Dashboards & Security Review

### »» Reports Created

- Created Tabular Reports on Volunteer Participation to list volunteers per event.
- Designed Summary Reports grouping participation by Event and Status (Registered, Cancelled).
- Developed Matrix Reports analyzing volunteer counts by Event Category vs Event Date.

Reports Created by Me							
3 items							
	Search reports created by me...	New Report	New Folder				
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Participation by Event and Status		Public Reports	Aditya Vishwakarma	26/9/2025, 6:32 pm		
Created by Me	Volunteer Counts by Category and Month		Public Reports	Aditya Vishwakarma	26/9/2025, 6:37 pm		
Private Reports	Volunteers per Event		Public Reports	Aditya Vishwakarma	26/9/2025, 6:27 pm		
Public Reports							

### »» Report Types

- Created Custom Report Type for Volunteer Event with Volunteer Participation (with or without related records).
- Enabled fields for use in report filters and columns:
  - ✓ Event Name, Event Date, Location, Max Volunteers, Current Volunteers
  - ✓ Participation Status, Participant Name, Email

SETUP

Custom Report Types

Event with Participation

Preview Layout Edit Layout Clone Delete Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Event with Participation

API Name

Event\_with\_Participation

Description

Events with or without participations

Created By

Aditya Vishwakarma, 9/26/25, 6:41 PM

Store in Category

cases

Deployment Status

Deployed

Modified By

Aditya Vishwakarma, 9/26/25, 6:43 PM

Fields

Source Object	Included Fields
Volunteer Events	5
Volunteer Participations	4

Object Relationships

Volunteer Events (A)

... with or without related records from Volunteer Participations (B)

A

B

A

B

## »» Dashboards

➤ Dashboard “Volunteer Overview” includes components:

- ✓ Bar Chart: Number of volunteers per event
- ✓ Pie Chart: Participation status distribution
- ✓ Metric: Upcoming events count
- ✓ Table: Recent volunteer sign-ups



## »» Dynamic Dashboards

- Configured dashboard to run as Logged-in User for personalized views.
- Set filter for user’s associated region or volunteer role.
- Enabled visibility based on user permissions.

### Add Filter

\*Select Field to Filter By (Required)

Event

1 equivalent field ⓘ

Display Name

Event

Filter Values (0)

1 New Filter Value

Add Filter Value

Operator

equals

Value

Community Waste Dsiposal

Display Text

Community Waste Dsiposal

Cancel Apply

## »» Sharing Settings

- Set Organization-Wide Defaults (OWD) for Volunteer\_Event\_\_c and Volunteer\_Participation\_\_c to Private.
- Shared event records with coordinators and managers via Sharing Rules.
- Created manual sharing scenarios for event volunteers to view their participations only.

SETUP Sharing Settings		
Service Request	Private	Private
Volunteer Event	Private	Private
Volunteer Participation	Controlled by Parent	Controlled by Parent

## »» Field Level Security

- Scoped data access by setting Field-Level Security per profile for sensitive fields:
  - ✓ Participant\_Email\_\_c visible only to HR and project managers.
  - ✓ Financial or personal participant details hidden from volunteers.

Set Field-Level Security  
Volunteer [Help for this Page](#)

[Save](#) [Cancel](#)

Field Label	Volunteer
Data Type	Lookup(User)
Field-Level Security for Profile	
	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Admin Profile	<input type="checkbox"/>
Analytics Cloud Integration User	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>
Force.com - Free User	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>
Identity User	<input type="checkbox"/>
Manager Platform Profile	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>
Read Only	<input type="checkbox"/>
Resident Platform Profile	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>
Standard User	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>

## »» Session Settings

- Configured session timeout to 2 hours for internal users.

- Enabled Session Security Level enhancements (e.g., Require IP address ranges).
- Enabled Locked Sessions on browser close options.

## Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value

2 hours

☐ Disable session timeout warning popup
 ☒ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated
 ☒ Lock sessions to the domain in which they were first used
 ☐ Terminate all of a user's sessions when an admin resets that user's password ⓘ
 ☒ Force relogin after Login-As-User
 ☐ Require HttpOnly attribute
 ☐ Use POST requests for cross-domain sessions
 ☐ Enforce login IP ranges on every request ⓘ
 ☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

## »» Login IP Ranges

- No login restrictions enforced.

## »» Audit Trail

- Enabled Setup Audit Trail to monitor all configuration changes.
- Monitored critical field history on **Volunteer\_Event\_\_c**:
  - ✓ Status\_\_c
  - ✓ Max\_Volunteers\_\_c
  - ✓ Event\_Date\_\_c

View Setup Audit Trail				
Date	User	Source Namespace Prefix	Action	Section
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Work.com Only User: field-level security for Volunteer Participation: Volunteer was changed from 2 to 0	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Volunteer Platform Profile: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Standard User: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Standard Platform User: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Solution Manager: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Silver Partner User: field-level security for Volunteer Participation: Volunteer was changed from 2 to 0	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users
26/09/2025, 7:44:57 pm IST	aditya.vishwakarma.cs22477@agentforce.com		Changed profile Resident Platform Profile: field-level security for Volunteer Participation: Volunteer was changed from Read/Write to No Access	Manage Users