

Phase 9 Reporting, Dashboards & Security Review

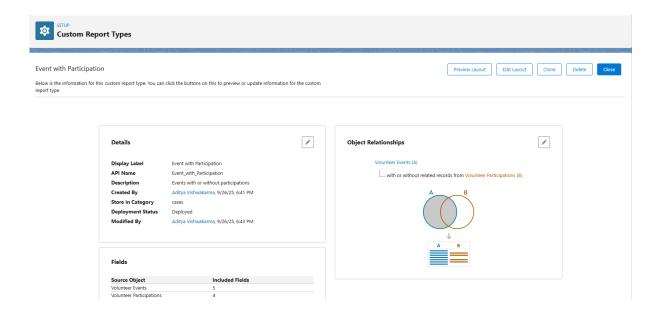
>>> Reports Created

- > 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



>>> 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



>>> Dashboards

> Dashboard "Volunteer Overview" includes components:

✓ Bar Chart: Number of volunteers per event

✓ Pie Chart: Participation status distribution

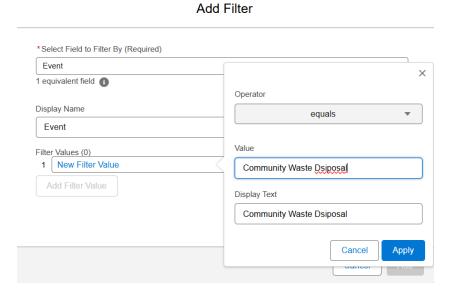
✓ Metric: Upcoming events count

√ 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.



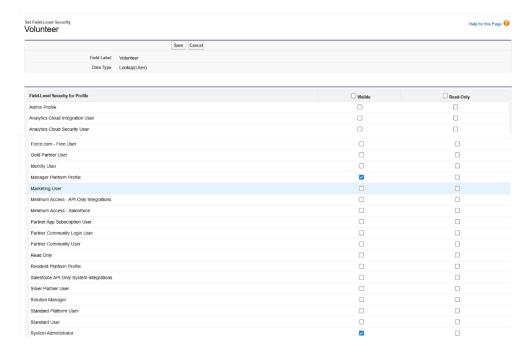
Sharing Settings

- 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.



>>> 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.



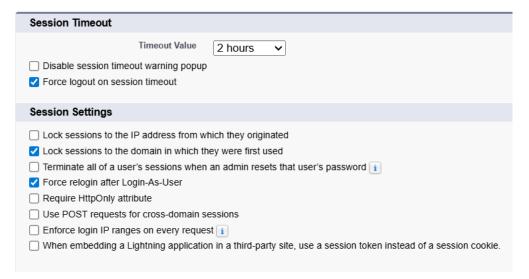
Session Settings

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.



>>> 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

