

# Project: Health Prescription & Appointment Management System

## Phase 9: Reporting, Dashboards & Security Review

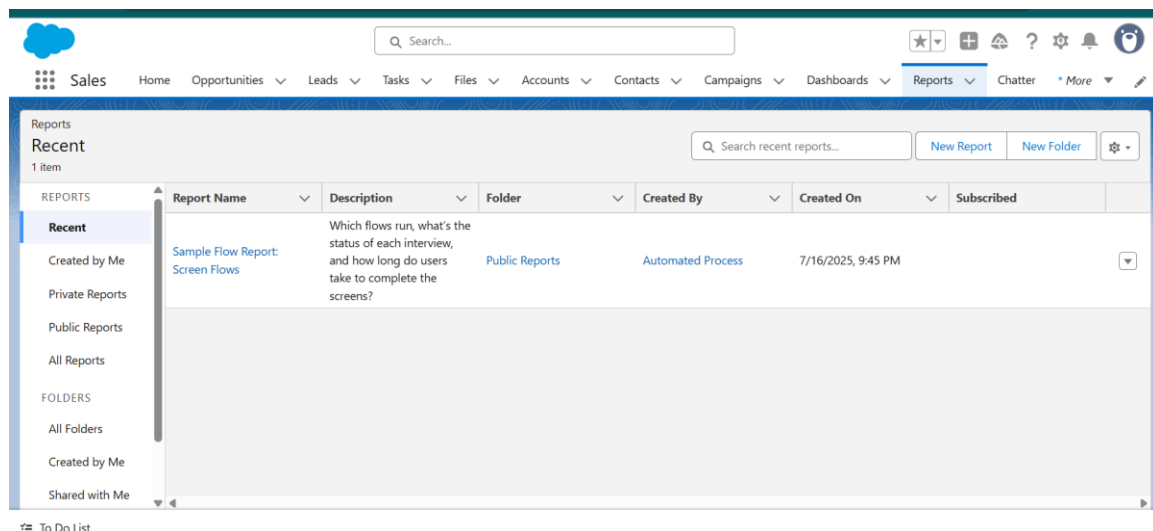
### Purpose

This phase focuses on delivering business insights through Salesforce reports and dashboards while ensuring that data security and compliance are maintained. Custom reports and dashboards were created to track prescriptions, appointments, and patient interactions. Additionally, a security review was conducted to validate data access controls and monitor system changes.

### 1. Reporting & Analytics

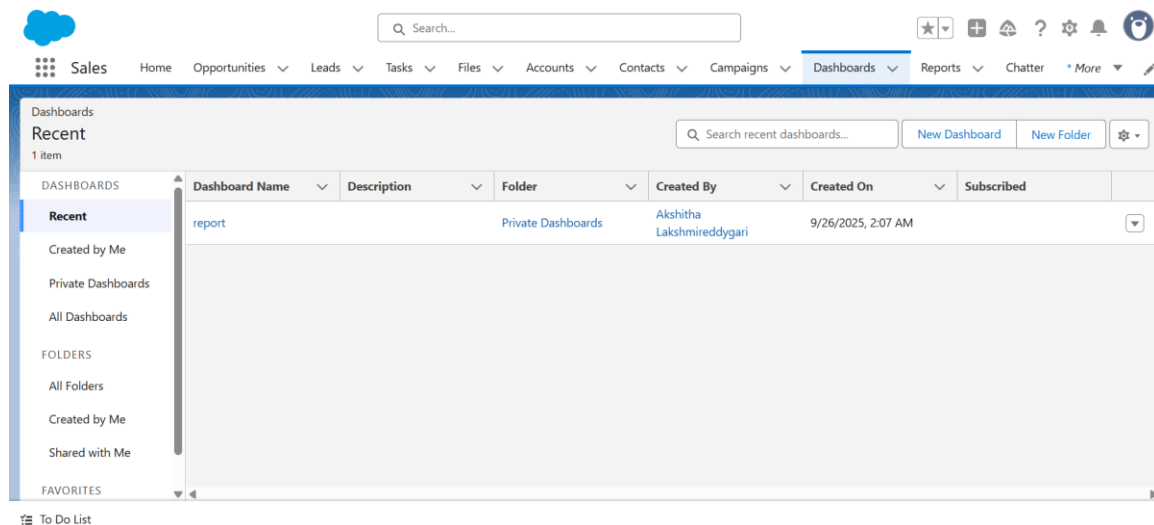
#### A. Custom Reports

- Custom reports were built on Patients, Prescriptions, and Appointments to analyze healthcare data.
- Examples include:
  - Appointments by Doctor & Date – helps staff monitor workload.
  - Prescriptions by Medicine Type – helps pharmacies track demand.
  - Patients by Condition – provides insight into common health issues.
- Reports were enhanced with charts for easy visualization.



## B. Management Dashboard

- A central Healthcare Dashboard was created for doctors, receptionists, and admins.
- Key components include:
  - Appointments by Status (Scheduled, Completed, Cancelled).
  - Top Prescribed Medicines.
  - Upcoming Appointments Overview.
- This dashboard gives hospital management a real-time overview for decision-making.



## 2. Security Review

### A. Object Permissions

- Profiles were reviewed to ensure the principle of least privilege.
- Doctors have access to Patient and Prescription data (Read/Edit).
- Receptionists have access to Appointments but limited patient details.
- Admins have full access to all records and setup.

**Permission Sets**

On this page you can create, view, and manage permission sets.

[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

Action	Permission Set Name	Description	License
<a href="#">Clone</a>	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in S...	Customer Data Platform
<a href="#">Clone</a>	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a...	Customer Data Cloud for Marketing
<a href="#">Clone</a>	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in S...	Customer Data Platform
<a href="#">Clone</a>	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in S...	Customer Data Platform
<a href="#">Clone</a>	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in S...	Customer Data Cloud for Marketing
<a href="#">Clone</a>	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in S...	Customer Data Cloud for Marketing
<a href="#">Clone</a>	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in S...	Customer Data Cloud for Marketing

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## B. Setup Audit Trail

- The Setup Audit Trail was reviewed to track system changes.
- It logs configuration updates like new fields, security changes, and report modifications.
- This ensures accountability and provides a history of all administrative changes.

**View Setup Audit Trail**

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 12:40:03 AM PDT	229x1a2833875@agentforce.com		Changed Enable Email To Salesforce from off to on	Email To Salesforce	
9/26/2025, 12:33:39 AM PDT	229x1a2833875@agentforce.com		Changed Appointment page layout Appointment Layout	Custom Objects	
9/26/2025, 12:30:34 AM PDT	229x1a2833875@agentforce.com		Activated flow version #2 "Appointment_Email_Flow" for flow with Unique Name "Appointment_Email_Flow"	Flows	
9/26/2025, 12:30:21 AM PDT	229x1a2833875@agentforce.com		Created flow version #2 "Appointment_Email_Flow" for flow with Unique Name "Appointment_Email_Flow"	Flows	
9/26/2025, 12:27:42 AM PDT	229x1a2833875@agentforce.com		Deactivated flow with Name "Appointment_Email_Flow" and Unique Name "Appointment_Email_Flow"	Flows	
9/25/2025, 9:39:32 AM PDT	229x1a2833875@agentforce.com		Activated flow with Name "Appointment_Email_Flow" and Unique Name "Appointment_Email_Flow"	Flows	
9/25/2025, 9:36:08 AM PDT	229x1a2833875@agentforce.com		Deleted flow version #1 "Appointment_Email_Flow" for flow with Unique Name "Appointment_Email_Flow"	Flows	

## Conclusion

Phase 9 successfully delivered custom reports, dashboards, and a security review. These features empower healthcare staff with actionable insights and ensure that sensitive patient and prescription data is managed securely.