


## Phase 9: Reporting, Dashboards & Security Review

## 1. Reports

### Custom Report Types:

- Appointments by Doctor



Doctor Appointment

Appointments

Receptionists

Doctors

Patients

Dashboards

Reports

Search...

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Reports

Recent

2 items

Search recent reports...

New Report

New Folder

⚙️


| REPORTS         | Report Name            | Description                                   | Folder          | Created By        | Created On          | Subscribed               |
|-----------------|------------------------|---|-----------------|-------------------|---------------------|--------------------------|
| Recent          | Appointments by Doctor |   | Private Reports | Atharva Gulhane   | 9/25/2025, 2:37 PM  | <input type="checkbox"/> |
| Created by Me   | Lead conversion rate   | What percentage of leads have been converted? | Channel Sales   | Automated Process | 9/16/2025, 12:52 PM | <input type="checkbox"/> |
| Private Reports |                        |   |                 |                   |                     |                          |
| Public Reports  |                        |   |                 |                   |                     |                          |
| All Reports     |                        |   |                 |                   |                     |                          |
| FOLDERS         |                        |   |                 |                   |                     |                          |
| All Folders     |                        |   |                 |                   |                     |                          |
| Created by Me   |                        |   |                 |                   |                     |                          |
| Shared with Me  |                        |   |                 |                   |                     |                          |
| FAVORITES       |                        |   |                 |                   |                     |                          |
| All Favorites   |                        |   |                 |                   |                     |                          |

History

Recent Items

## 2. Dashboards

- Appointment Dashboards:



Doctor Appointment

Appointments

Receptionists

Doctors

Patients

Dashboards

Reports

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Dashboards

Recent

1 item

Q

Search recent dashboards...

New Dashboard

New Folder

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| DASHBOARDS | Dashboard Name        | Description | Folder             | Created By      | Created On         | Subscribed   |
|------------|-----------------------|-------------|--------------------|-----------------|--------------------|--------------|
| Recent     | Appointment Dashboard |             | Private Dashboards | Atharva Gulhane | 9/25/2025, 2:38 PM | <div>🔔</div> |

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

### 3. Security Review

#### Sharing Settings:

- **Organization-Wide Defaults (OWD):**
  - Patient → Private
  - Appointment → Private
  - Prescription → Controlled by Parent (inherits Appointment)
- **Role Hierarchy:** Admin > Doctor > Receptionist
- **Sharing Rules:**
  - Appointment shared with assigned Doctor automatically
  - Admin has “View All” override

#### 4. Field-Level Security (FLS):

- Sensitive fields (e.g., Patient contact info, Prescription details) restricted based on **profile/role**
- Doctors: Access to prescriptions
- Receptionists: No direct access to prescription details

#### 5. Session Settings:

- Session timeout: 30 minutes idle time
- Multi-factor authentication enabled for all users

#### 6. Login IP Ranges:

- Restrict login access to **hospital network IPs** for Doctors & Receptionists
- Admin has unrestricted login for management purposes