

Phase 9: Reporting, Dashboards & Security Review

Airline Management System

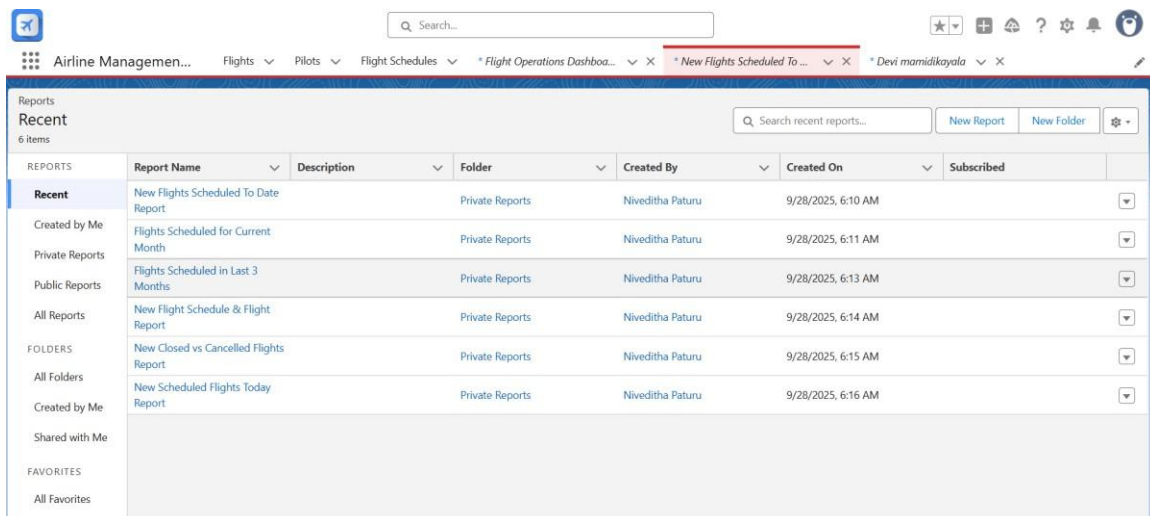
Salesforce-Based Passenger & Operations Management

1. Reports (Tabular, Summary, Matrix, Joined)

Reports provide actionable insights into the operations of the Airline Management System. Different report formats are created based on specific requirements:

- **Scheduled Flights Today (Tabular Report):** Displays all flights scheduled for the current day with fields such as Flight Name, Source, Destination, Departure Time, and Status.
- **Closed vs Cancelled Flights (Summary/Pie Chart Report):** Provides a graphical breakdown of successfully closed flights versus cancelled flights, helping management quickly identify operational challenges.
- **Flights Scheduled To Date (Summary Report):** Shows all flights scheduled until the current date, grouped by Company and Status, enabling trend analysis.
- **Flights Scheduled for Current Month (Matrix Report):** Presents flights within the ongoing month, organized by Company (rows) and Status (columns) to compare performance.
- **Flights Scheduled in Last 3 Months (Trend/Joined Report):** Highlights scheduling patterns and performance trends over the last quarter, useful for strategic planning.

These reports together provide comprehensive coverage of daily operations, monthly performance, and long-term trends.



The screenshot displays the Salesforce Reports interface. At the top, there is a search bar and navigation tabs for 'Airline Management...', 'Flights', 'Pilots', 'Flight Schedules', and 'Flight Operations Dashboard'. Below this, a 'Reports' section shows a list of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The reports listed are:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Flights Scheduled To Date Report		Private Reports	Niveditha Paturu	9/28/2025, 6:10 AM	
Flights Scheduled for Current Month		Private Reports	Niveditha Paturu	9/28/2025, 6:11 AM	
Flights Scheduled in Last 3 Months		Private Reports	Niveditha Paturu	9/28/2025, 6:13 AM	
New Flight Schedule & Flight Report		Private Reports	Niveditha Paturu	9/28/2025, 6:14 AM	
New Closed vs Cancelled Flights Report		Private Reports	Niveditha Paturu	9/28/2025, 6:15 AM	
New Scheduled Flights Today Report		Private Reports	Niveditha Paturu	9/28/2025, 6:16 AM	

This screenshot shows the 'New Flight Schedule & Flight Report' interface. The top navigation bar includes 'Airline Management...', 'Flights', 'Pilots', 'Flight Schedules', and 'Flight Operations Dashboard'. The report title is 'Report: Flight Schedule & Flight' and 'New Flight Schedule & Flight Report'. It features a search bar, 'Enable Field Editing', 'Add Chart', and 'Edit' buttons. The 'Total Records' section shows 1 record. The table below displays the following data:

	Flight Schedule ID
1	FMS-000001

This screenshot shows the 'New Closed vs Cancelled Flights Report' interface. The top navigation bar is identical to the first screenshot. The report title is 'Report: Closed vs Cancelled Flights' and 'New Closed vs Cancelled Flights Report'. It features a search bar, 'Enable Field Editing', 'Add Chart', and 'Edit' buttons. The 'Total Records' section shows 1 record. The table below displays the following data:

	Flight Schedule ID
1	FMS-000001

This screenshot shows the 'New Scheduled Flights Today Report' interface. The top navigation bar is identical to the previous screenshots. The report title is 'Report: Scheduled Flights Today' and 'New Scheduled Flights Today Report'. It features a search bar, 'Enable Field Editing', 'Add Chart', and 'Edit' buttons. The 'Total Records' section shows 1 record. The table below displays the following data:

	Flight Schedule ID
1	FMS-000001

2. Report Types

A custom report type was created to combine data from Flight Schedule and Flight objects:

- Primary Object: Flight Schedule
- Related Object: Flight (via lookup)
- Fields Included: Flight ID, Flight Name, Company, International/Domestic Type, along with schedule fields like Source, Destination, Departure, Arrival, Duration, and Status.

This report type allows users to generate detailed and combined reports. Deployment status is set to 'Deployed' so that end users can access the reports in production.

The screenshot shows the Salesforce Setup interface for Custom Report Types. The left sidebar contains a navigation menu with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Under 'Setup', there are sections for 'Feature Settings' (including 'Analytics' with 'Reports & Dashboards' and 'Report Types' highlighted), and 'Security' (including 'Guest User Sharing Rule Access' and 'Report'). A search bar at the top of the sidebar contains 'rep'. The main content area is titled 'Custom Report Types' and shows a report type named 'Flights Scheduled in Last 3 Months'. Below the title are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. A description states: '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'. The report type details are shown in two columns: 'Details' and 'Object Relationships'. The 'Details' column lists: Display Label (Flights Scheduled in Last 3 Months), API Name (Flights_Scheduled_in_Last_3_Months), Description (Flights Scheduled in Last 3 Months), Created By (Niveditha Paturu, 9/28/25, 6:30 PM), Store in Cat... (cases), and Deployment... (In Development). The 'Object Relationships' column shows a diagram with a circle labeled 'A' and the text 'Flight Schedules (A)'.

The screenshot shows the Salesforce Setup interface for Custom Report Types. The left sidebar contains a navigation menu with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Under 'Setup', there are sections for 'Feature Settings' (including 'Analytics' with 'Reports & Dashboards' and 'Report Types' highlighted), and 'Security' (including 'Guest User Sharing Rule Access' and 'Report'). A search bar at the top of the sidebar contains 'rep'. The main content area is titled 'Custom Report Types' and shows a report type named 'Flights Scheduled for Current Month'. Below the title are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. A description states: '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'. The report type details are shown in two columns: 'Details' and 'Object Relationships'. The 'Details' column lists: Display Label (Flights Scheduled for Current Month), API Name (Flights_Scheduled_for_Current_Month), Description (Flights Scheduled for Current Month), Created By (Niveditha Paturu, 9/28/25, 6:29 PM), Store in Cat... (cases), and Deployment... (In Development). The 'Object Relationships' column shows a diagram with a circle labeled 'A' and the text 'Flight Schedules (A)'.

Setup

Home

Object Manager

Search Setup

rep

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access Report

Didn't find what you're looking for? Try using Global Search.

Custom Report Types

Flights Scheduled To Date

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

API Name

Description

Created By

Store in Cat...

Deploymen...

Flights Scheduled To Date

Flights_Scheduled_To_Date

Flights Scheduled To Date

Niveditha Paturu, 9/28/25, 6:28 PM

cases

In Development

Object Relationships

Flight Schedules (A)

A

Setup

Home

Object Manager

Search Setup

rep

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access Report

Didn't find what you're looking for? Try using Global Search.

Custom Report Types

Scheduled Flights Today

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

API Name

Description

Created By

Store in Cat...

Deploymen...

Scheduled Flights Today

Scheduled_Flights_Today

Scheduled Flights Today

Niveditha Paturu, 9/28/25, 4:17 PM

other

In Development

Object Relationships

Flight Schedules (A)

A

Setup

Home

Object Manager

Search Setup

rep

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access Report

Didn't find what you're looking for? Try using Global Search.

Custom Report Types

Flight Schedule & Flight

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

API Name

Description

Flight Schedule & Flight

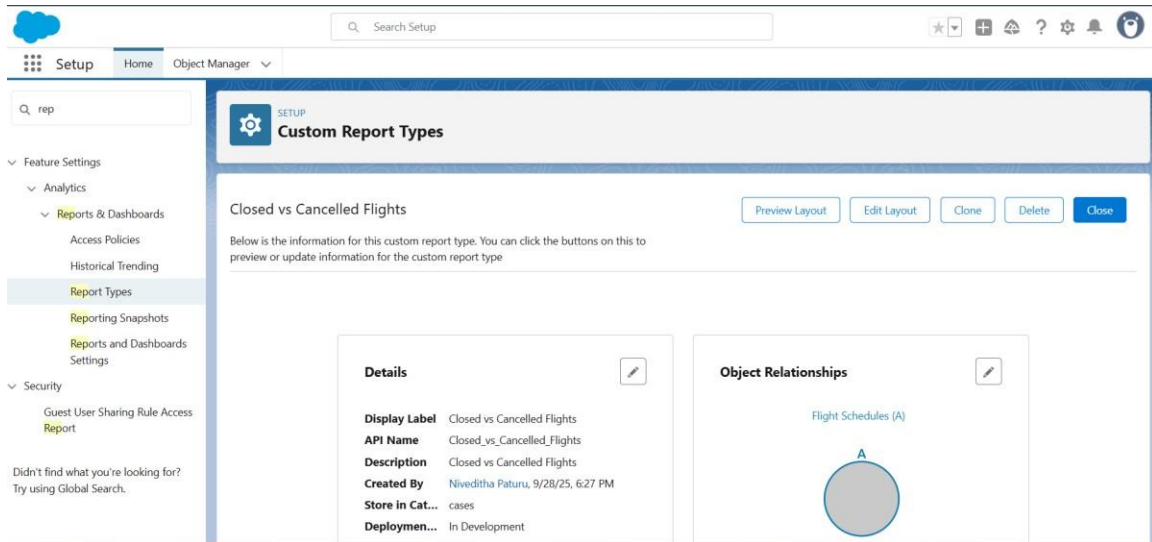
Flight_Schedule_Flight

*This report type allows users to generate reports combining Flight Schedules with related Flight details. It helps analyze schedules along with flight-specific

Object Relationships

Flight Schedules (A)

A

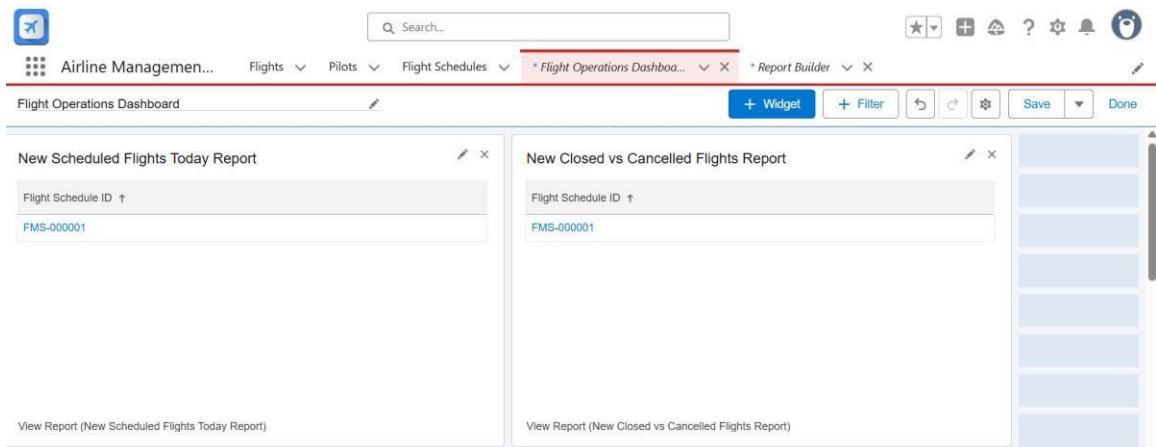
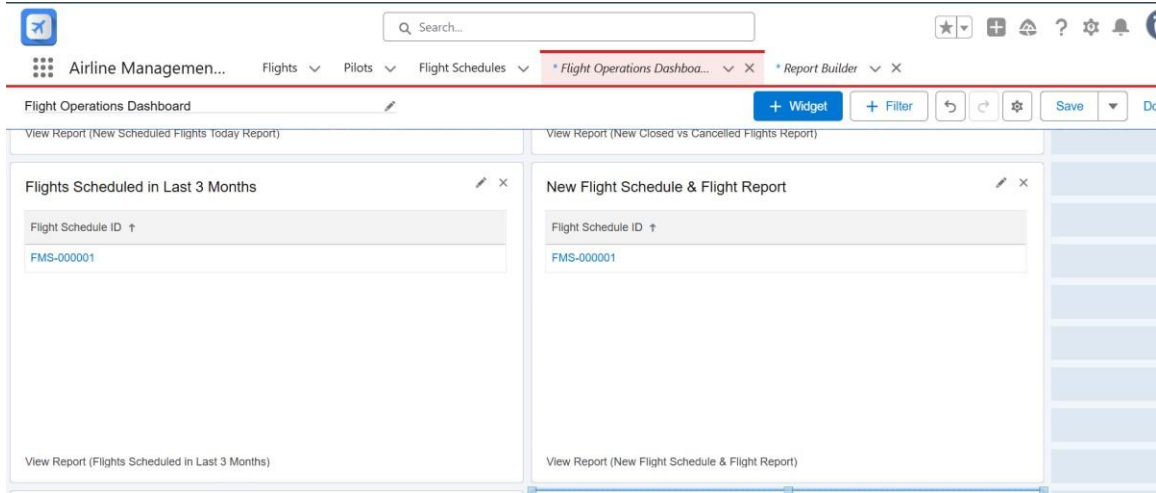
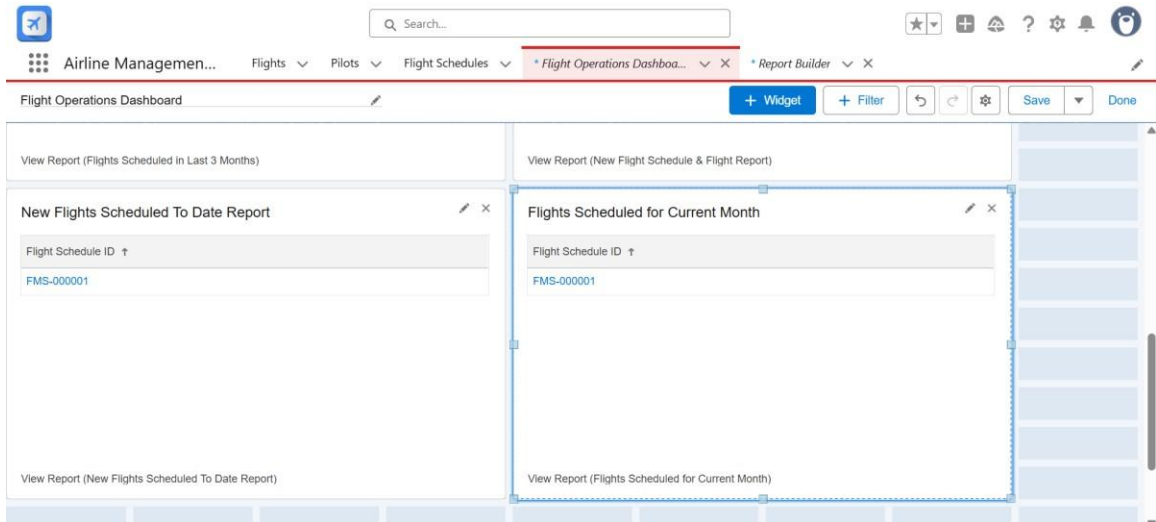


3. Dashboards

Dashboards provide a consolidated view of the reports through visual components, enabling managers and executives to make informed decisions at a glance. The following dashboard components were created:

- Scheduled Flights Today – Bar chart displaying number of flights by status.
- Closed vs Cancelled Flights – Pie chart showing distribution of completed versus cancelled flights.
- Flights Scheduled To Date – Table with grouping by Flight Company.
- Current Month Schedules – Line chart showing number of schedules created this month.
 - Last 3 Months Schedules – Trend chart showing flight scheduling patterns over the past quarter.

These dashboards provide a single-pane view of daily, monthly, and quarterly operational data.



4. Dynamic Dashboards

Dynamic dashboards ensure that users see data based on their role and access permissions.

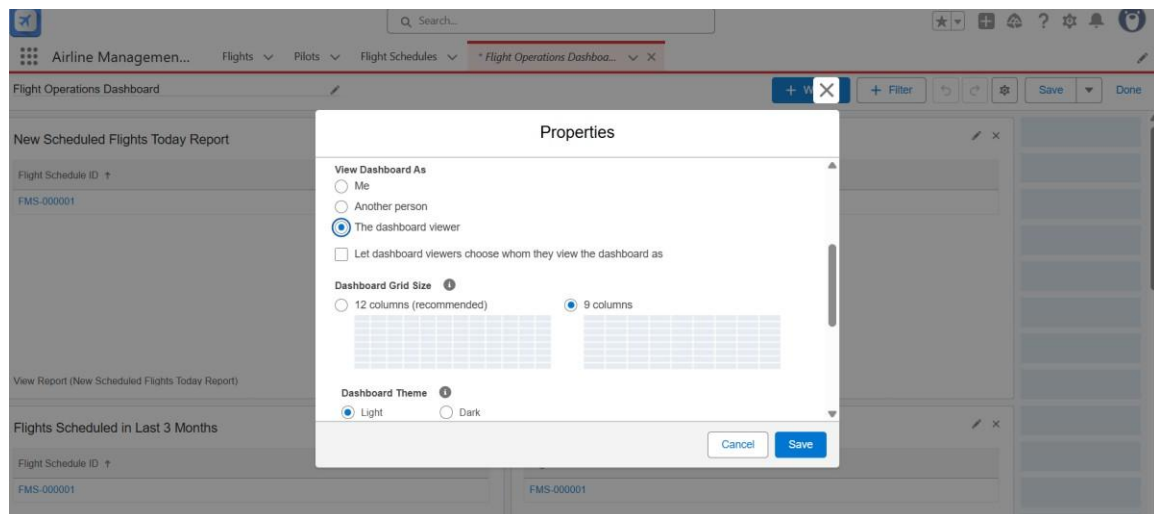
Instead of creating separate dashboards for each user group, a single dynamic dashboard serves all roles:

- CEO View: Sees all flights and schedules across the organization.
- Manager View: Sees only schedules created by operators reporting to them.
- Operator View: Sees only their own schedules.

Steps to configure dynamic dashboards:

1. Create a dashboard and add required components from reports.
2. Save the dashboard in a shared folder accessible to CEO, Manager, and Operators.
3. In 'View Dashboard As', select 'The dashboard viewer'.
4. Test by logging in as CEO, Manager, and Operator to confirm that visibility changes as per roles.

This approach eliminates redundancy and ensures users only see the data they are authorized to view.

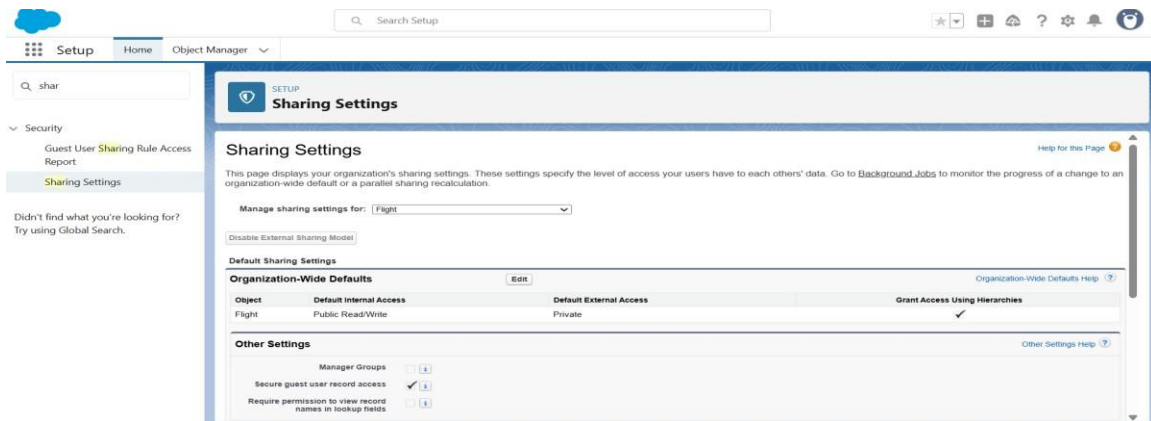


5. Sharing Settings

Sharing settings define record-level access in Salesforce:

- Flight Object: Public Read Only – allows all users to view flight details while restricting edits.
- Flight Schedule Object: Controlled by Profile and Role hierarchy – Operators can edit, CEO can only view.
- Pilot Object: Restricted – Only Managers and Operators have access to pilot details.

This ensures that sensitive data is protected while maintaining operational transparency.

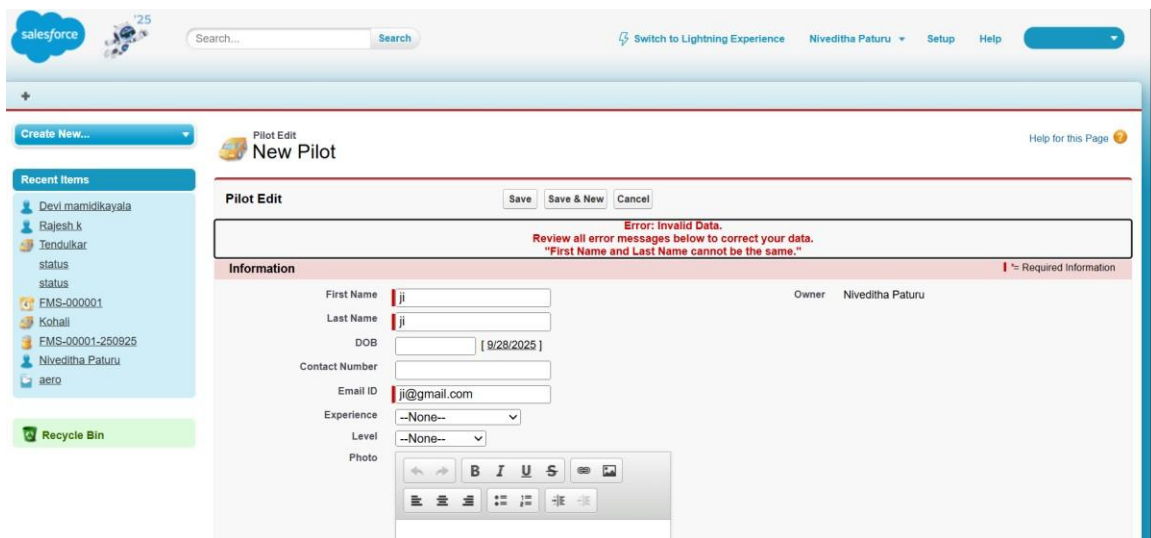


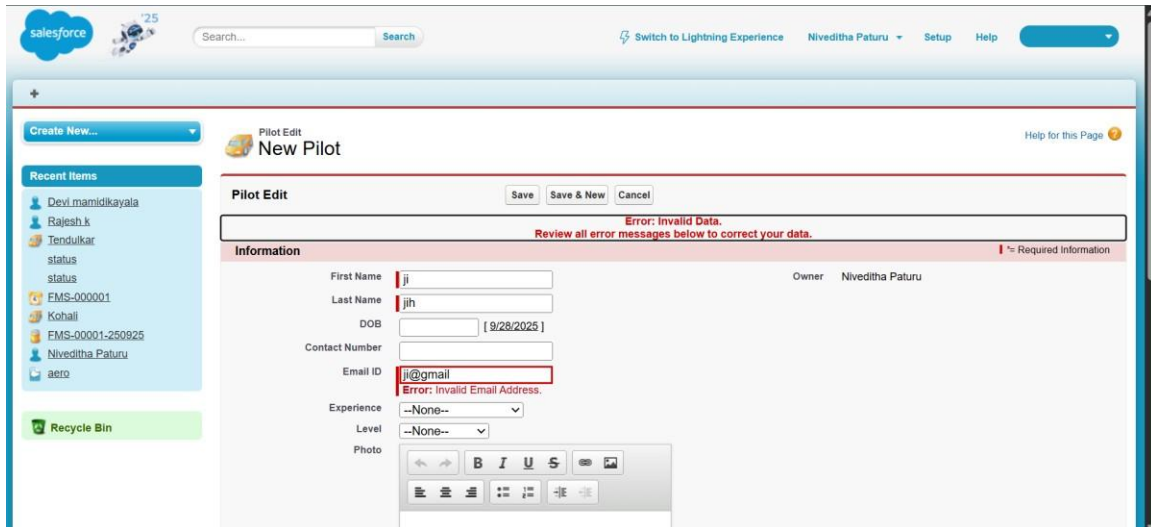
6. Field Level Security

Field-level security restricts access to sensitive fields depending on roles:

- Pilot Email – Visible to Operators and Manager, hidden from CEO.
- Pilot Age – Visible to Manager, restricted for Operators.
- Flight Company – Editable for Manager, read-only for Operators.

This ensures sensitive or non-essential fields are hidden from unauthorized users.



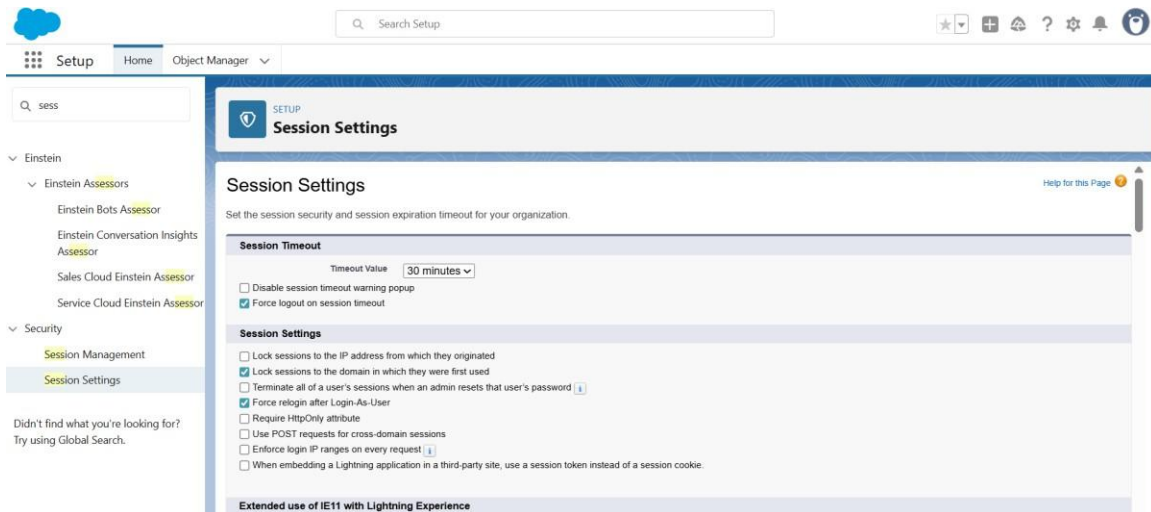


7. Session Settings

Session settings are configured to strengthen user login security:

- Session Timeout: 30 minutes of inactivity.
- Forced Logout: Users must re-authenticate after timeout.
- HTTPS Only: Ensures all communication is encrypted.

These settings protect the system from unauthorized access due to idle sessions.



8. Login IP Ranges

Login IP restrictions add another layer of security by limiting access from trusted networks only:

- Operators: Restricted to office IP ranges.
- Manager: Allowed from office and secure VPN.
- CEO: Allowed from all IPs for global access.

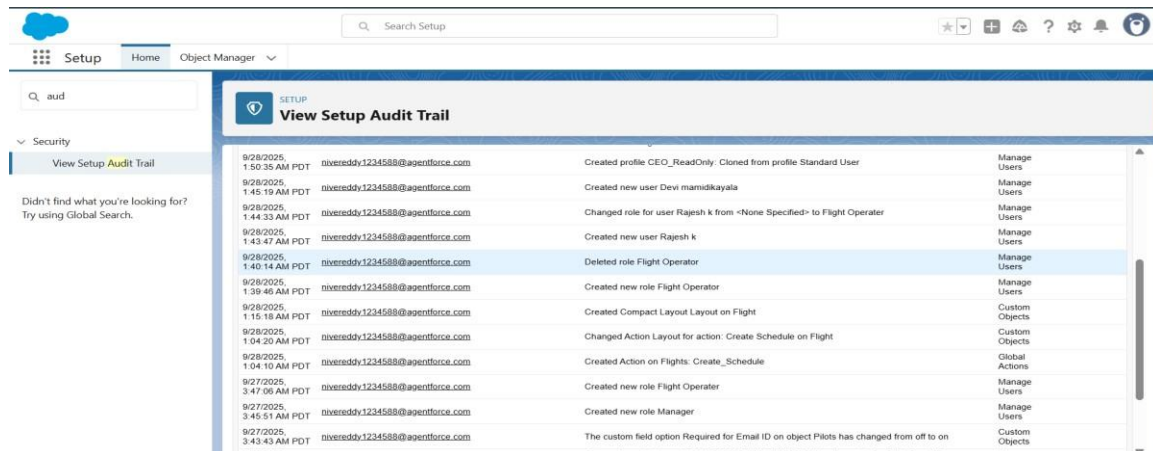
This prevents unauthorized logins from unknown networks.

9. Audit Trail

Audit Trail helps track administrative changes in Salesforce:

- Records changes such as creation of fields, validation rules, reports, and dashboards.
- Maintains history of up to 6 months.
- Provides details on what was changed, by whom, and when.

This ensures accountability and helps administrators troubleshoot unexpected changes.



The screenshot shows the 'View Setup Audit Trail' page in Salesforce. The interface includes a search bar at the top, a navigation menu on the left with 'Setup', 'Home', and 'Object Manager', and a main content area displaying a table of audit trail records. The table has columns for 'When Changed', 'Who Changed', 'What Changed', and 'Where Changed'. The records show various administrative actions performed by users, including creating profiles, creating new users, changing roles, deleting roles, creating layouts, and creating actions.

When Changed	Who Changed	What Changed	Where Changed
9/28/2025, 1:50:35 AM PDT	nivereddy1234588@agentforce.com	Created profile CEO_ReadOnly: Cloned from profile Standard User	Manage Users
9/28/2025, 1:45:19 AM PDT	nivereddy1234588@agentforce.com	Created new user Devi mamidkayala	Manage Users
9/28/2025, 1:44:33 AM PDT	nivereddy1234588@agentforce.com	Changed role for user Rajesh k from <None Specified> to Flight Operator	Manage Users
9/28/2025, 1:43:47 AM PDT	nivereddy1234588@agentforce.com	Created new user Rajesh k	Manage Users
9/28/2025, 1:40:14 AM PDT	nivereddy1234588@agentforce.com	Deleted role Flight Operator	Manage Users
9/28/2025, 1:39:40 AM PDT	nivereddy1234588@agentforce.com	Created new role Flight Operator	Manage Users
9/28/2025, 1:15:18 AM PDT	nivereddy1234588@agentforce.com	Created Compact Layout Layout on Flight	Custom Objects
9/28/2025, 1:04:20 AM PDT	nivereddy1234588@agentforce.com	Changed Action Layout for action: Create Schedule on Flight	Custom Objects
9/28/2025, 1:04:10 AM PDT	nivereddy1234588@agentforce.com	Created Action on Flights: Create_Schedule	Global Actions
9/27/2025, 3:47:06 AM PDT	nivereddy1234588@agentforce.com	Created new role Flight Operator	Manage Users
9/27/2025, 3:46:51 AM PDT	nivereddy1234588@agentforce.com	Created new role Manager	Manage Users
9/27/2025, 3:43:43 AM PDT	nivereddy1234588@agentforce.com	The custom field option Required for Email ID on object Plots has changed from off to on	Custom Objects

10. Conclusion

Phase 9 focuses on reporting, dashboards, and security review. By creating multiple report formats and dashboards, management can gain insights into operational performance. Dynamic dashboards provide tailored views for each role, while security measures such as sharing settings, field-level security, session settings, login IP ranges, and audit trails ensure that the system remains secure and compliant. This phase enhances decision-making while safeguarding data integrity.

salesforce 25 Search... Search

Switch to Lightning Experience Niveditha Paturu Setup Help

Create New...

Recent Items

- Devi.mamidikayala
- Rajesh.k
- Tendulkar
- status
- status
- FMS-000001
- Kohali
- FMS-00001-250925
- Niveditha Paturu
- aero

Recycle Bin

Pilot Edit

New Pilot

Save Save & New Cancel

Information

First Name

Last Name

DOB [9/28/2025]

Contact Number

Email ID

Experience --None--

Level --None--

Photo

Owner Niveditha Paturu

Help for this Page

salesforce 25 Search... Search

Switch to Lightning Experience Niveditha Paturu Setup Help

Create New...

Recent Items

- Devi.mamidikayala
- Rajesh.k
- Tendulkar
- status
- status
- FMS-000001
- Kohali
- FMS-00001-250925
- Niveditha Paturu
- aero

Recycle Bin

Flight Schedule Edit

New Flight Schedule

Save Save & New Cancel

Information

Select Flight

Source Name --None--

Destination Name --None--

Departure Date Time [9/28/2025 6:38 AM]

Arrival Date Time [9/28/2025 6:38 AM]

Status Open

Name of the First Pilot

Name of the Second Pilot

Owner Niveditha Paturu

Help for this Page

salesforce 25 Search... Search

Switch to Lightning Experience Niveditha Paturu Setup Help

Create New...

Recent Items

- Devi.mamidikayala
- Rajesh.k
- Tendulkar
- status
- status
- FMS-000001
- Kohali
- FMS-00001-250925
- Niveditha Paturu
- aero

Recycle Bin

Flight Edit

New Flight

Save Save & New Cancel

Information

Flight Name

Company Indigo

International/Domestic ☒

Owner Niveditha Paturu

Help for this Page

Copyright © 2000-2025 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app