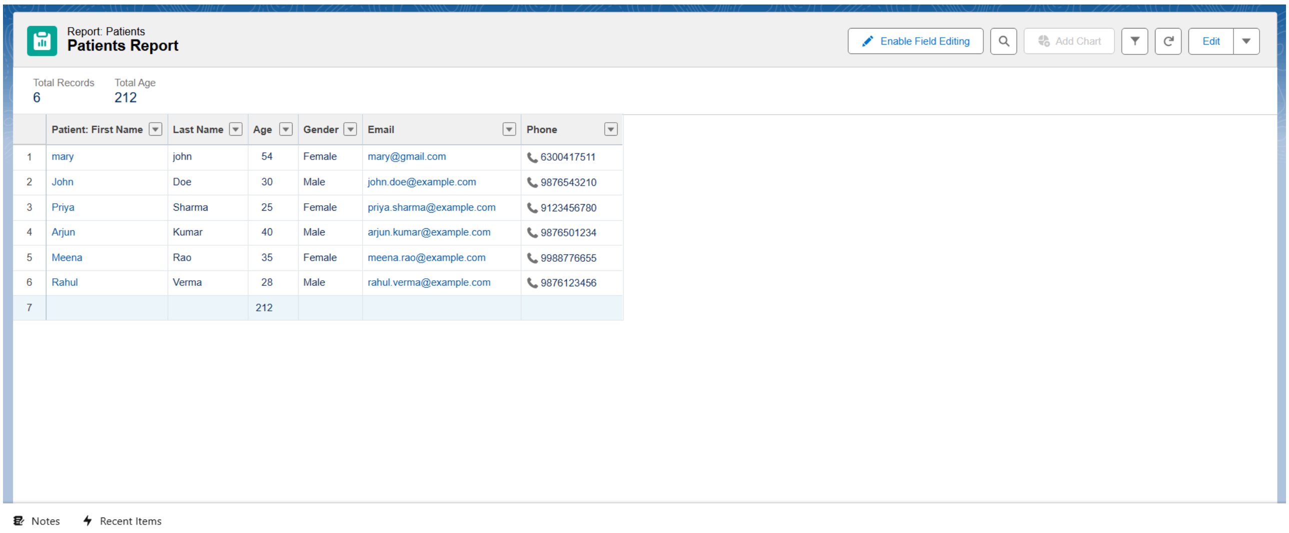
Phase 9: Reporting, Dashboards & Security Review

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

- Created **tabular reports** such as Appointments Report (with fields: Appointment Date/Time, Patient, Doctor, Status).
- Created **summary reports** by grouping data (e.g., Appointments grouped by Doctor).
- Added **charts** to summary reports for visualization.
- Matrix and joined report types were evaluated but not required for this project.

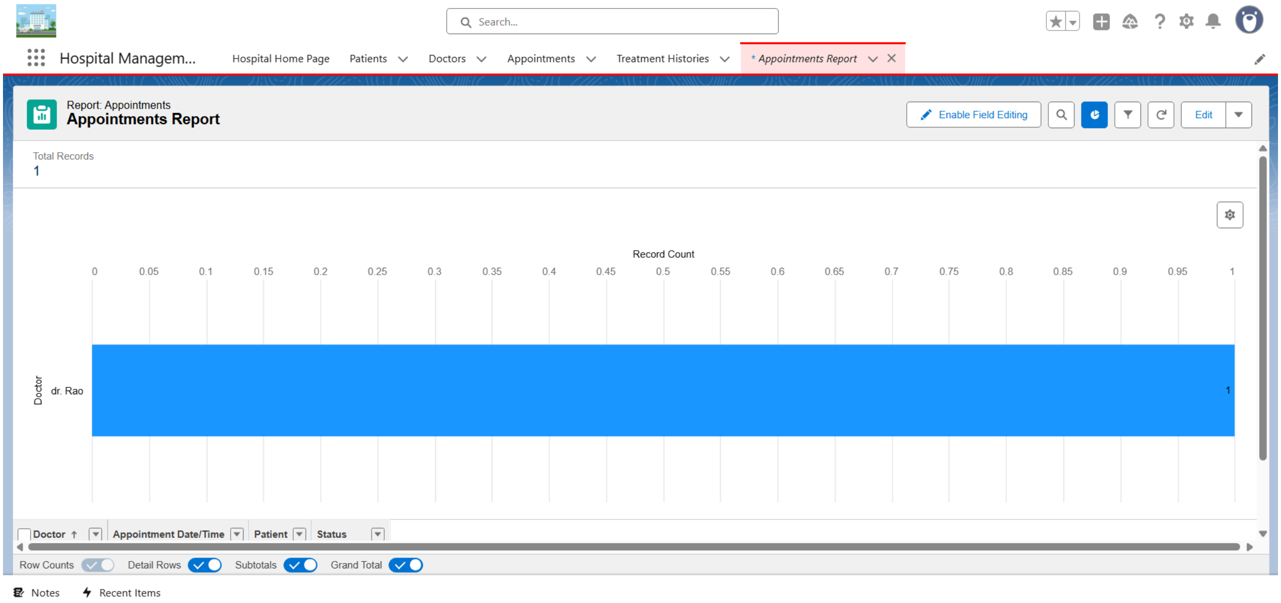


Report: Patients
Patients Report

Total Records 6

Total Age 212

	Patient: First Name	Last Name	Age	Gender	Email	Phone
1	mary	john	54	Female	mary@gmail.com	☎ 6300417511
2	John	Doe	30	Male	john.doe@example.com	☎ 9876543210
3	Priya	Sharma	25	Female	priya.sharma@example.com	☎ 9123456780
4	Arjun	Kumar	40	Male	arjun.kumar@example.com	☎ 9876501234
5	Meena	Rao	35	Female	meena.rao@example.com	☎ 9988776655
6	Rahul	Verma	28	Male	rahul.verma@example.com	☎ 9876123456
7			212			



Report: Appointments
Appointments Report

Total Records
1

Doctor ↑	Appointment Date/Time	Patient	Status

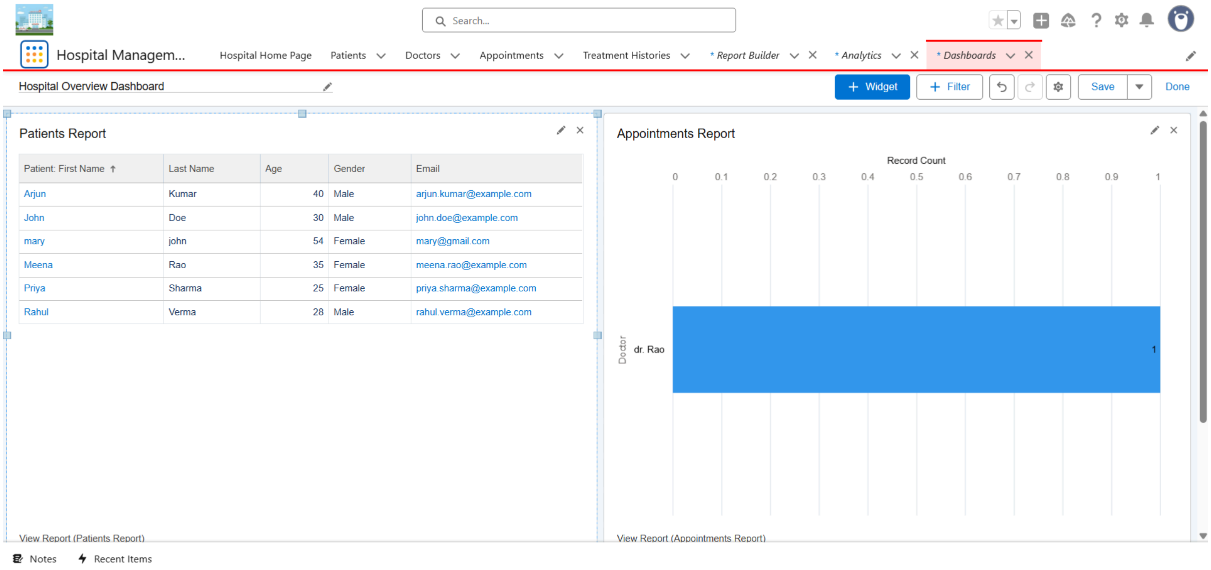
Row Counts ○ Detail Rows ✓ Subtotals ✓ Grand Total ✓

2) Report Types

- Standard report types were sufficient (Patients, Doctors, Appointments).
- Custom report type creation was explored but not essential since standard relationships already supported required reporting.
- Decision: Use standard report types to simplify reporting.

3) Dashboards

- A **Hospital Overview Dashboard** was created.
- Added **Patients Report** as a table widget.
- Added **Appointments Report** as a bar chart widget.



Hospital Overview Dashboard

Patients Report

Patient: First Name ↑	Last Name	Age	Gender	Email
Arjun	Kumar	40	Male	arjun.kumar@example.com
John	Doe	30	Male	john.doe@example.com
mary	john	54	Female	mary@gmail.com
Meena	Rao	35	Female	meena.rao@example.com
Priya	Sharma	25	Female	priya.sharma@example.com
Rahul	Verma	28	Male	rahul.verma@example.com

View Report (Patients Report)

Appointments Report

View Report (Appointments Report)

4) Dynamic Dashboards

- Dynamic dashboards are typically used when each user must see only their own data (e.g., doctor-specific appointments).

- For this hospital project, a **single admin view** is sufficient.

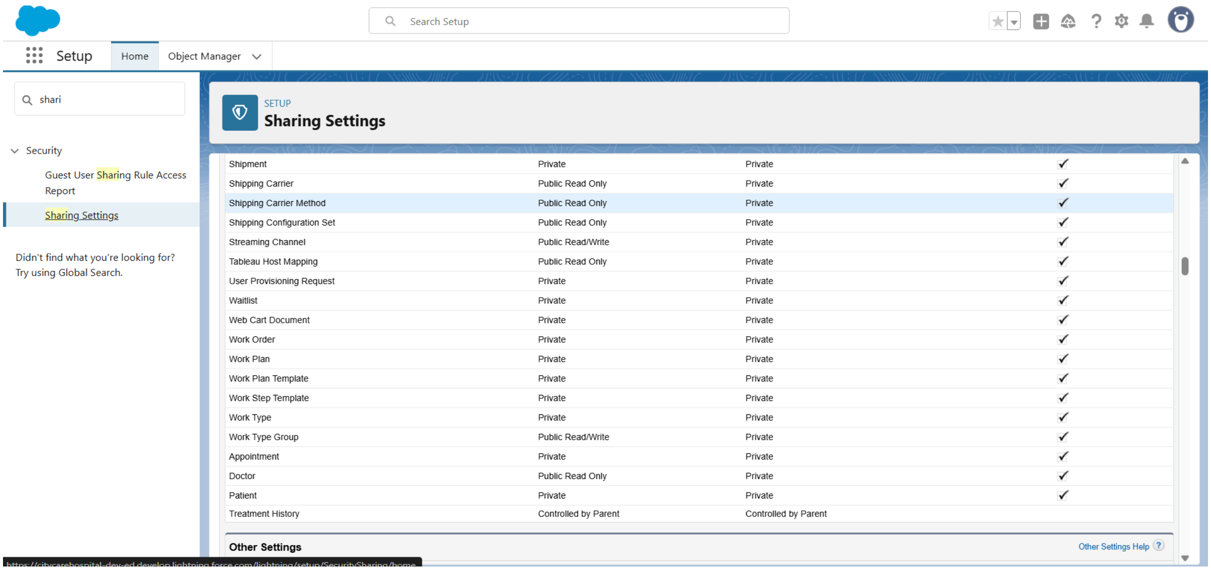
- Dynamic dashboards were not required.

5) Sharing Settings (OWD)

- Organization-Wide Defaults (OWD) were configured.

- Appointment records set to **Private**, ensuring only owners and role hierarchy can access them.

- Patient and Doctor data controlled for visibility as per hierarchy.



Search Setup
Setup
Home
Object Manager
shari
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP

Sharing Settings

Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Appointment	Private	Private	✓
Doctor	Public Read Only	Private	✓
Patient	Private	Private	✓
Treatment History	Controlled by Parent	Controlled by Parent	

Other Settings

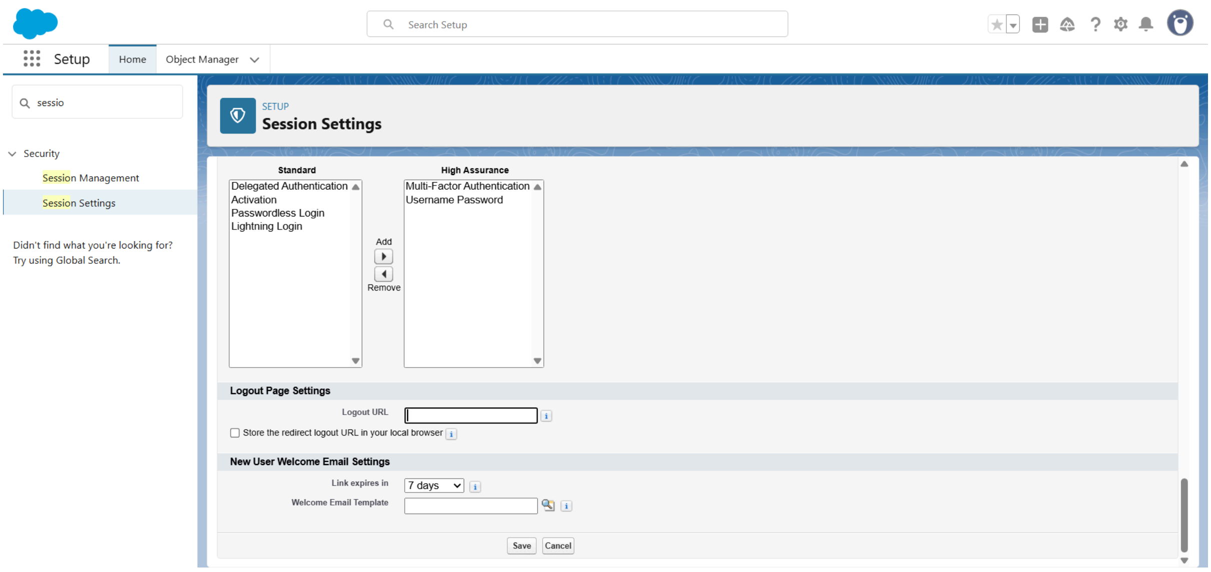
Other Settings Help
https://citycarehospital-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

6) Field-Level Security

- Configured field-level security to restrict access to sensitive data.
- Example: Certain profile roles cannot view patient email/phone fields.
- Ensures compliance with data privacy requirements.

7) Session Settings

- Updated session settings to enforce higher security.
- Configured **Multi-Factor Authentication (MFA)** and **Username + Password** as High Assurance.
- This ensures stronger login security for hospital system access.



Standard	High Assurance
Delegated Authentication Activation Passwordless Login Lightning Login	Multi-Factor Authentication Username Password

Logout Page Settings

Logout URL

□ Store the redirect logout URL in your local browser

New User Welcome Email Settings

Link expires in: 7 days

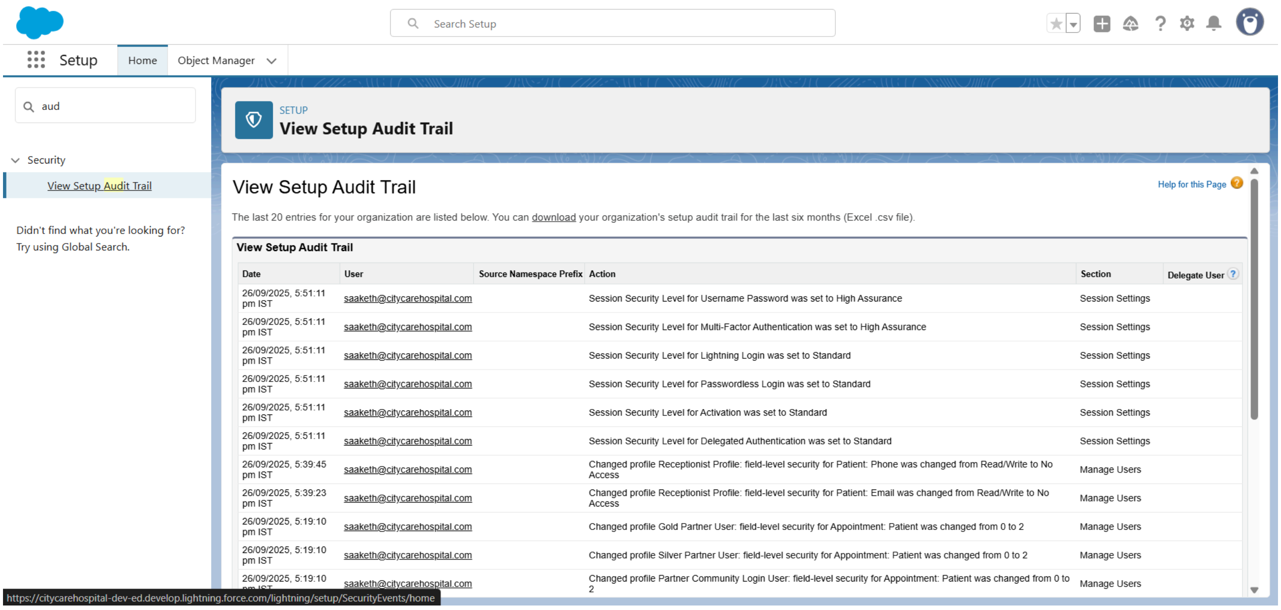
Welcome Email Template

8) Login IP Ranges

- IP range restrictions can prevent unauthorized external access.
- Not required for this project since it is running in a developer/test org.

9) Audit Trail

- **Setup Audit Trail** reviewed to track configuration changes.
- Captures admin actions like object creation, field updates, and security 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).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Username Password was set to High Assurance	Session Settings	
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Activation was set to Standard	Session Settings	
26/09/2025, 5:51:11 pm IST	saaketh@citycarehospital.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
26/09/2025, 5:39:45 pm IST	saaketh@citycarehospital.com		Changed profile Receptionist Profile: field-level security for Patient: Phone was changed from Read/Write to No Access	Manage Users	
26/09/2025, 5:39:23 pm IST	saaketh@citycarehospital.com		Changed profile Receptionist Profile: field-level security for Patient: Email was changed from Read/Write to No Access	Manage Users	
26/09/2025, 5:19:10 pm IST	saaketh@citycarehospital.com		Changed profile Gold Partner User: field-level security for Appointment: Patient was changed from 0 to 2	Manage Users	
26/09/2025, 5:19:10 pm IST	saaketh@citycarehospital.com		Changed profile Silver Partner User: field-level security for Appointment: Patient was changed from 0 to 2	Manage Users	
26/09/2025, 5:19:10 pm IST	saaketh@citycarehospital.com		Changed profile Partner Community Login User: field-level security for Appointment: Patient was changed from 0 to 2	Manage Users	

- Helps in compliance and system monitoring.