

Phase 9: Reporting, Dashboards & Security Review

1. Introduction

Explanation:

This phase ensures that business insights are effectively visualized while maintaining strict data security, privacy, and governance.

It focuses on creating meaningful reports and dashboards for decision-making, and implementing Salesforce's security model — including Profiles, Roles, Permission Sets, OWD, Sharing Rules, and Audit Trails.

Objectives:

- Enable meaningful business analytics through reports and dashboards.
- Implement layered security across records, fields, and sessions.
- Maintain compliance and data protection standards.

2. Reports

Use Case 1: Tabular Report – Product Inventory Summary

Scenario:

Display all products with their available stock and minimum stock level in a simple table.

Steps:

1. Navigate to **Reports** → **New Report** → **Products**.
2. Add columns: Product Name, Category, Available Stock, Minimum Stock Level.
3. Apply filters: Active = TRUE.
4. Save as “Product Inventory Summary.”

Home > Lightning Report

Report: products
Product Inventory Summary

Total Records: 1 Total Available Stock: 100

	Product_c: Product Name	Available Stock	Category
1	paracetamol	100	Medicine
2		100	

3. Report Types

Use Case:

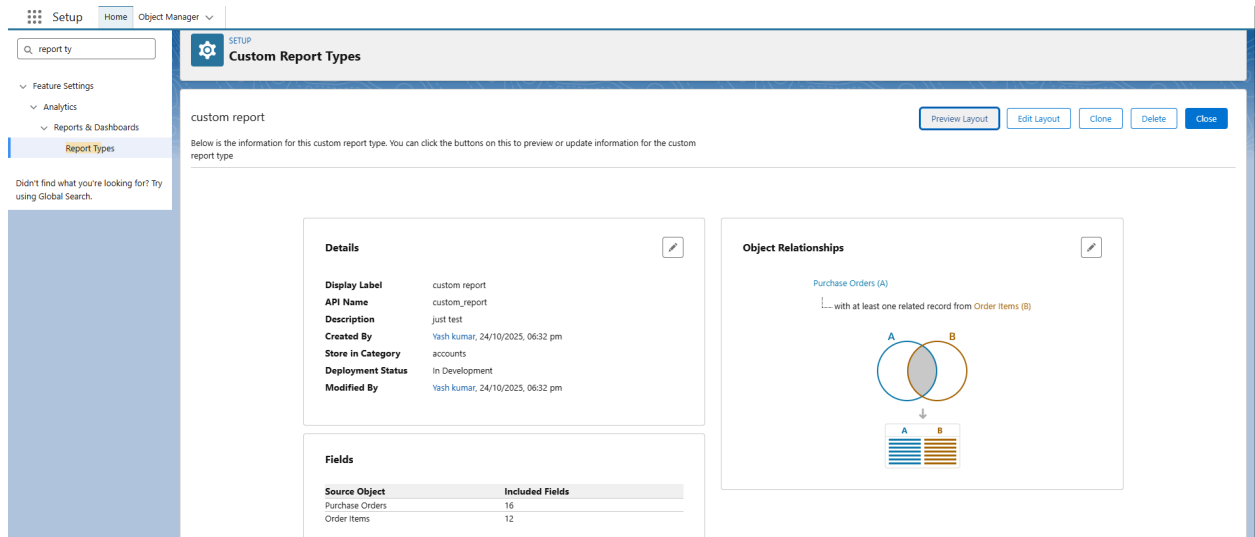
Define custom report types for relationships between objects.

Example:

“Purchase Orders with Order Items” → allows deeper analysis of each order and its product lines.

Steps:

1. Setup → Report Types → New Custom Report Type.
2. Primary Object: Purchase_Order__c.
3. Related Object: Order_Item__c.



4. Dashboards

Use Case: “Medical Innovator Dashboard”

Scenario:

Summarize business KPIs visually — stock levels, purchase trends, supplier performance.

Dashboard Components:

Component	Source Report	Chart Type	Purpose
Top Suppliers	Purchase Orders by Supplier	Donut Chart	Supplier performance
Stock Status	Product Inventory Summary	Bar Chart	Low-stock visibility
Purchase Trends	Orders by Month	Line Chart	Track trends over time
Product Movement	Inventory Transactions	Table	View transactions

5. Dynamic Dashboards

Use Case:

Display dashboards based on who's logged in — each role sees only their relevant data.

Scenario:

- The inventory manager sees his branch's stock data.
- Inventory Head sees all organization data.

Steps:

1. Edit Dashboard → View As: "Logged-in User".
2. Assign proper folder sharing to profiles.

6. Profiles

Use Case:

Profiles control what users can see and do (object, field, app, and tab-level permissions).

Scenario:

Create two custom profiles:

- **Inventory Manager** → Full access to Products, Orders, Reports.
- **Purchase Manager** → Access to Suppliers, Orders, but read-only Products.

Steps:

1. Setup → Profiles → Clone Standard User.
2. Adjust Object and Field permissions accordingly.

7. Roles.

Scenario:

Role structure:

- **Inventory Head**
 - **Inventory Manager**
 - **Purchase Manager**

Steps:

1. Setup → Roles → Set Up Roles.
2. Create hierarchy and assign users.

8. Permission Sets

Use Case:

Grant extra access without changing the user's profile.

Scenario:

Give “Report Editing” permission to specific users temporarily.

Steps:

1. Setup → Permission Sets → New.
2. Enable “Run Reports” and “Manage Dashboards.”
3. Assign to target users.

9. Organization-Wide Defaults (OWD)

Use Case:

OWD sets baseline record-level access across the organization.

Scenario:

- Product: Public Read Only
- Supplier: Private
- Purchase Order: Controlled by Parent

Steps:

1. Setup → Sharing Settings.
2. Edit Default OWD access for each object.

10. Sharing Rules**Use Case:**

Grant wider access beyond OWD for collaboration.

Scenario:

Allow Purchase Managers to view Suppliers owned by Inventory Managers.

Steps:

1. Setup → Sharing Settings → New Sharing Rule.
2. Based on role → Share Supplier records with specific role.

11. Sharing Settings**Use Case:**

Central place to manage OWD, Role Hierarchy, and Rules.

Steps:

1. Setup → Sharing Settings.
2. Verify all object-level sharing rules are correctly configured.

12. Field-Level Security (FLS)

Use Case: Restrict visibility or editability of sensitive fields.

Scenario: Hide “Total Order Cost” from Purchase Manager profile.

Steps:

1. Object → Fields → Set Field-Level Security.
2. Uncheck “Visible” for restricted profiles.

13. Session Settings

Use Case: Increase session timeout and restrict simultaneous logins for better control.

Steps:

1. Setup → Session Settings.
2. Set session timeout: 60 minutes.
3. Enable IP lock and prevent concurrent logins.

14. Login IP Ranges

Use Case: Restrict Salesforce access to trusted networks only.

Scenario: Allow login only from college or office networks.

Steps:

1. Setup → Profiles → Login IP Ranges → New.
2. Add start & end IP address (e.g., 192.168.1.1 to 192.168.1.255).

15. Audit Trail

Use Case:

Track configuration changes for security and compliance.

Steps:

1. Setup → View Setup Audit Trail.
2. Review recent configuration activities.
3. Export audit logs for record keeping.