Salesforce Project Phase-9

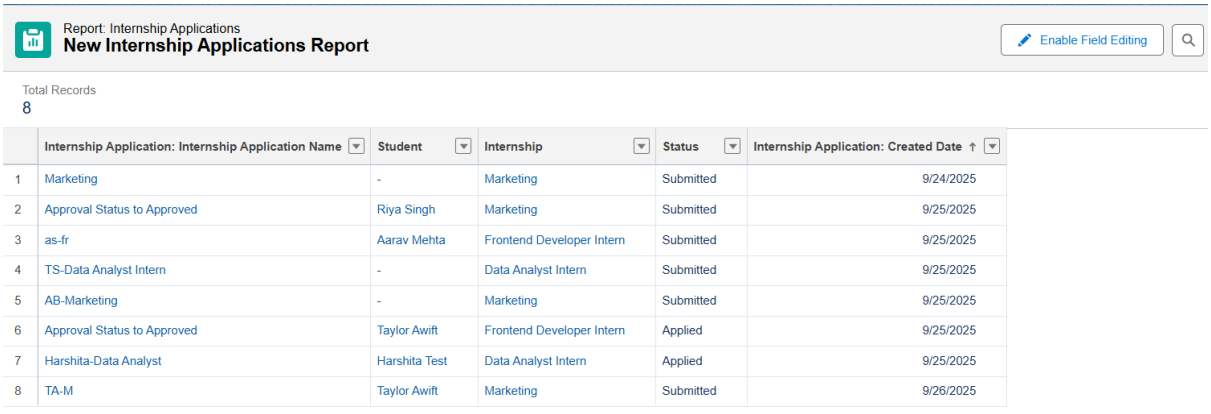
Phase 3: Reporting, Dashboards & Security Review

Phase 9 focuses on Reporting, Dashboards, and Security Review within Salesforce. In this phase, various reports and dashboards were created to provide actionable insights, and security measures were applied to ensure that sensitive student and financial data remains protected.

Reports

□ Created a Tabular report " all internship application" (Student , Internship , Status)

Created a Summary Report "Application by Status"(Group by status, add chart)

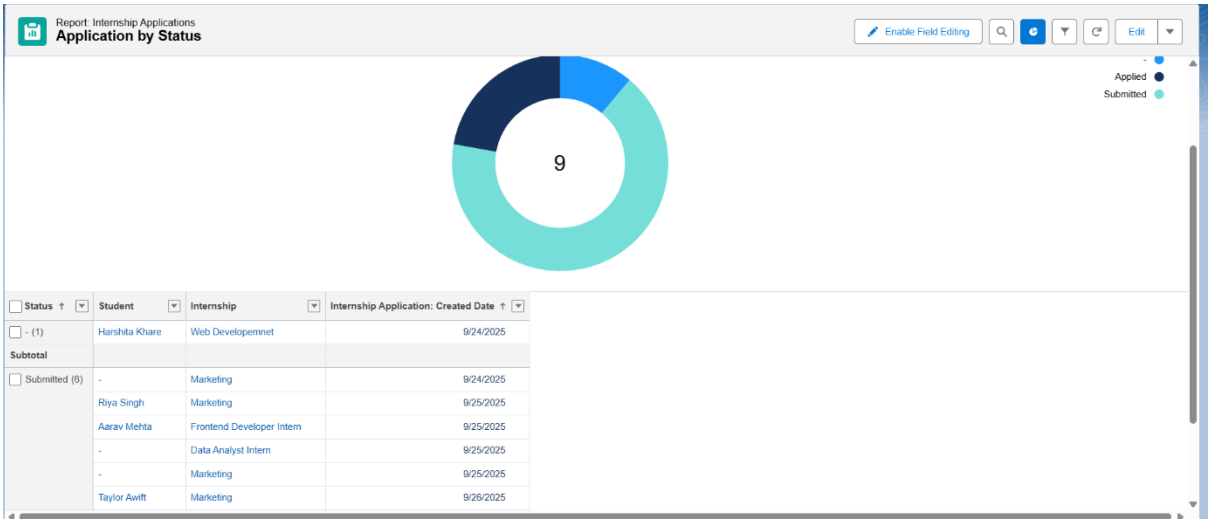


Report: Internship Applications
New Internship Applications Report

Enable Field Editing

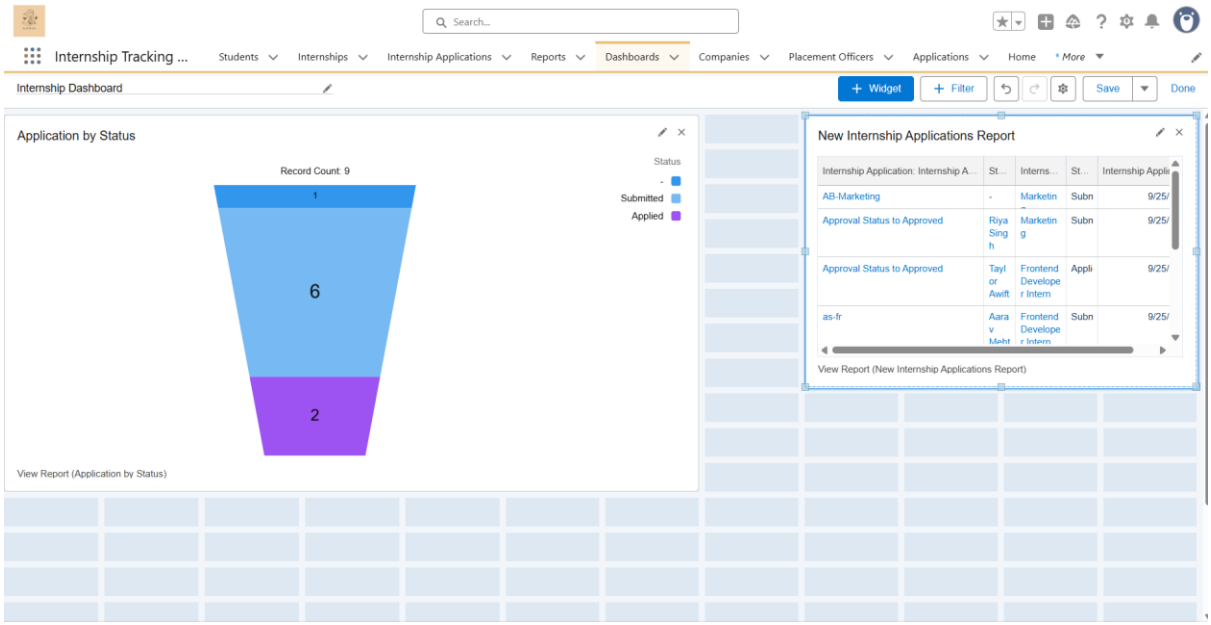
Total Records
8

	Internship Application: Internship Application Name	Student	Internship	Status	Internship Application: Created Date
1	Marketing	-	Marketing	Submitted	9/24/2025
2	Approval Status to Approved	Riya Singh	Marketing	Submitted	9/25/2025
3	as-fr	Aarav Mehta	Frontend Developer Intern	Submitted	9/25/2025
4	TS-Data Analyst Intern	-	Data Analyst Intern	Submitted	9/25/2025
5	AB-Marketing	-	Marketing	Submitted	9/25/2025
6	Approval Status to Approved	Taylor Awift	Frontend Developer Intern	Applied	9/25/2025
7	Harshita-Data Analyst	Harshita Test	Data Analyst Intern	Applied	9/25/2025
8	TA-M	Taylor Awift	Marketing	Submitted	9/26/2025



Dashboards

- Developed a **Management Dashboard** with visual charts showing admissions, revenue, and enrollment trends.
- Configured **Dynamic Dashboards** to ensure that users only see data according to their roles (e.g., faculty, management).
- Used graphs and visual indicators for **real-time decision-making**.



Security Review

- Applied **Field-Level Security (FLS)** to protect sensitive data such as student personal details and fee records.
- Enabled **Audit Trail** to track configuration and data changes made by administrators.
- Configured **Login IP Ranges** and **Session Settings** to enhance login security.
- Reviewed **Sharing Settings** to ensure controlled access to records based on role hierarchy

4️⃣ Profiles & Roles

Profiles: Control access to objects, fields, tabs.

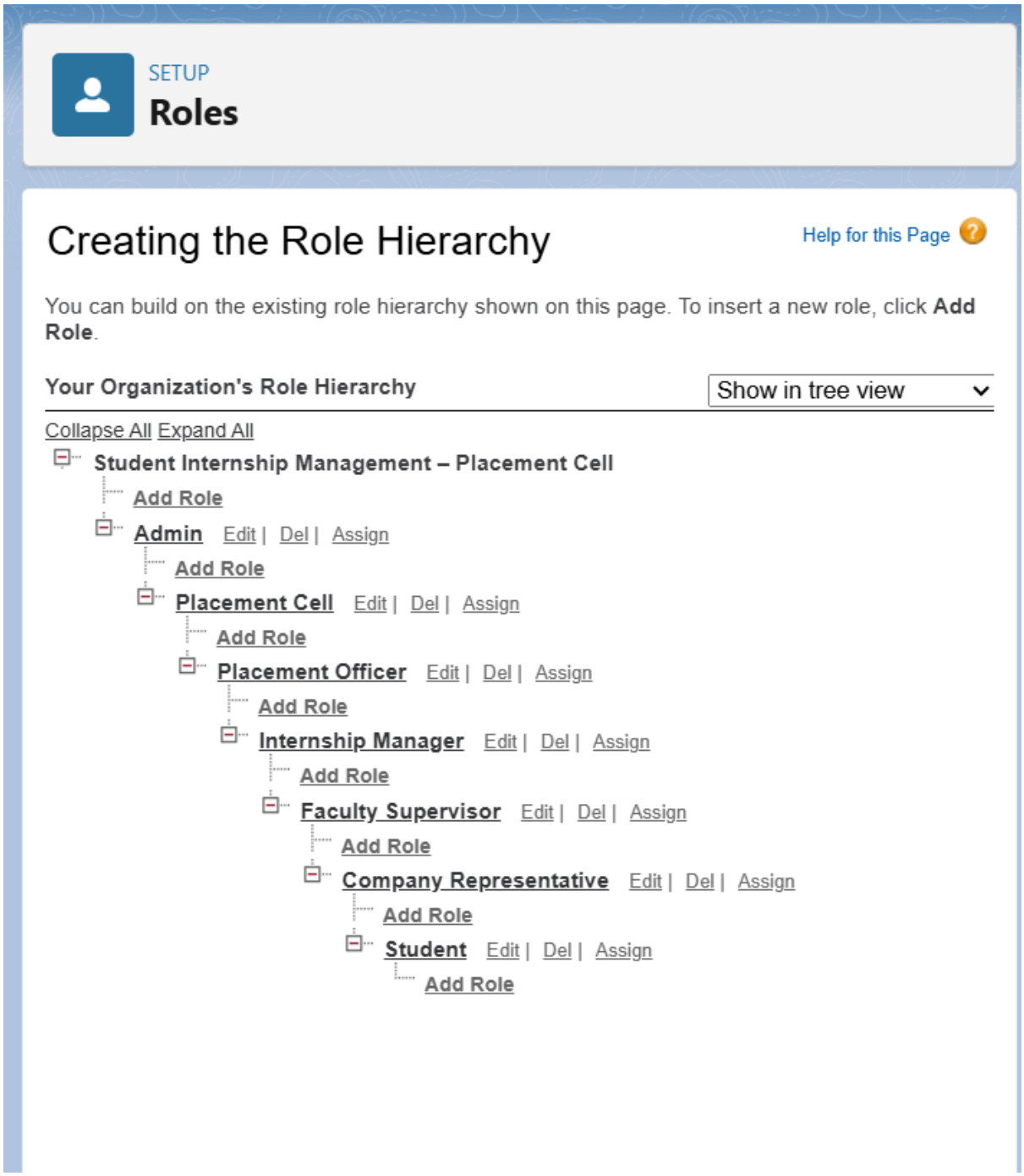
Roles: Control record visibility in hierarchy.

Example for Project:

Admin: Full access.

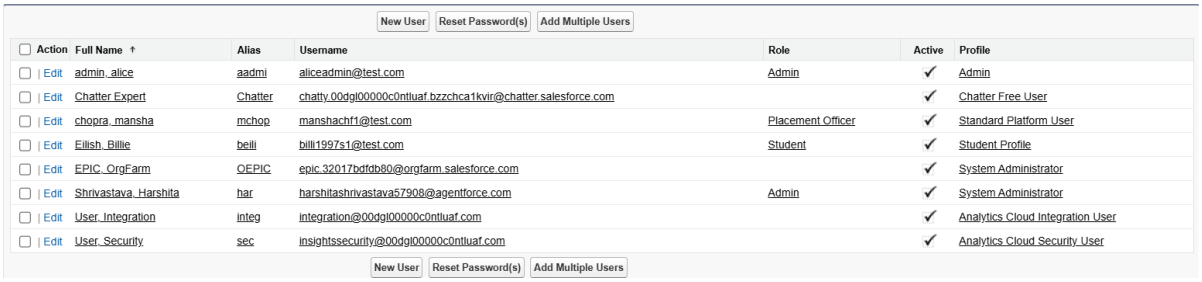
Placement Officer: Can view/edit Internship Applications, see Student info.

Student: Can view own Internship Applications and recommendations.



Users & Permission Sets

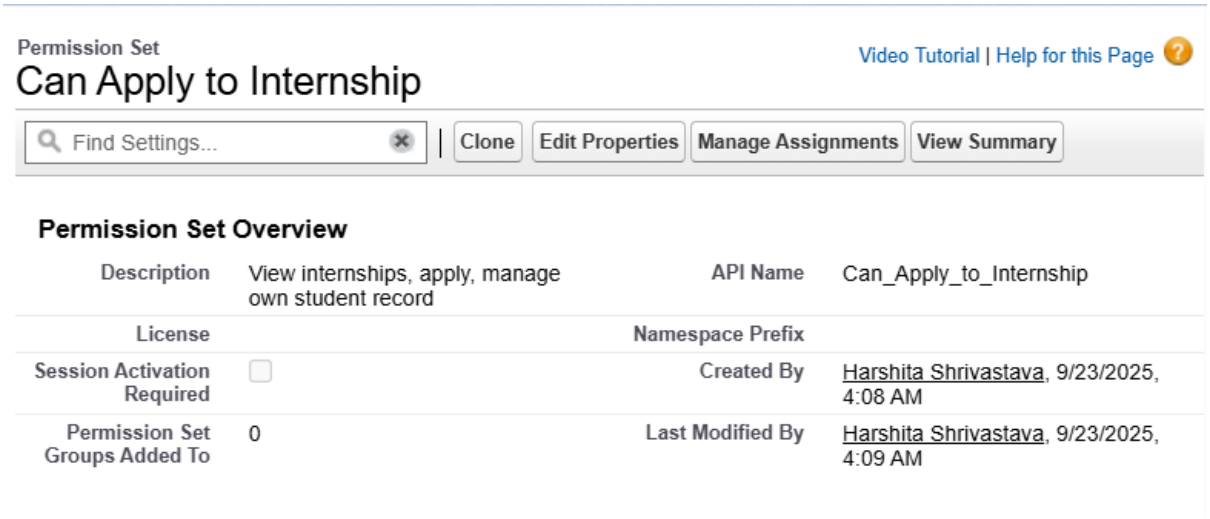
Users: Actual logins in Salesforce.
Permission Sets: Extra permissions for specific users without changing profile.



New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	admin, alice	aadmi	aliceadmin@test.com	Admin	✓	Admin
Edit	Chatter Expert	Chatter	chatty.00dgl00000c0ntluaf.bzzchca1kvir@chatter.salesforce.com		✓	Chatter Free User
Edit	chopra, mansha	mchop	manshachf1@test.com	Placement Officer	✓	Standard Platform User
Edit	Eilish, Billie	beili	billi1997s1@test.com	Student	✓	Student Profile
Edit	EPIC, OrgFarm	OEPIC	epic.32017bdfdb80@orgfarm.salesforce.com		✓	System Administrator
Edit	Shrivastava, Harshita	har	harshitashrivastava57908@agentforce.com	Admin	✓	System Administrator
Edit	User, Integration	integ	integration@00dgl00000c0ntluaf.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00dgl00000c0ntluaf.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users



Permission Set
Can Apply to Internship

Video Tutorial | Help for this Page

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description	View internships, apply, manage own student record	API Name	Can_Apply_to_Internship
License		Namespace Prefix	
Session Activation Required	☐	Created By	Harshita Shrivastava, 9/23/2025, 4:08 AM
Permission Set Groups Added To	0	Last Modified By	Harshita Shrivastava, 9/23/2025, 4:09 AM

Organization-Wide Defaults (OWD)

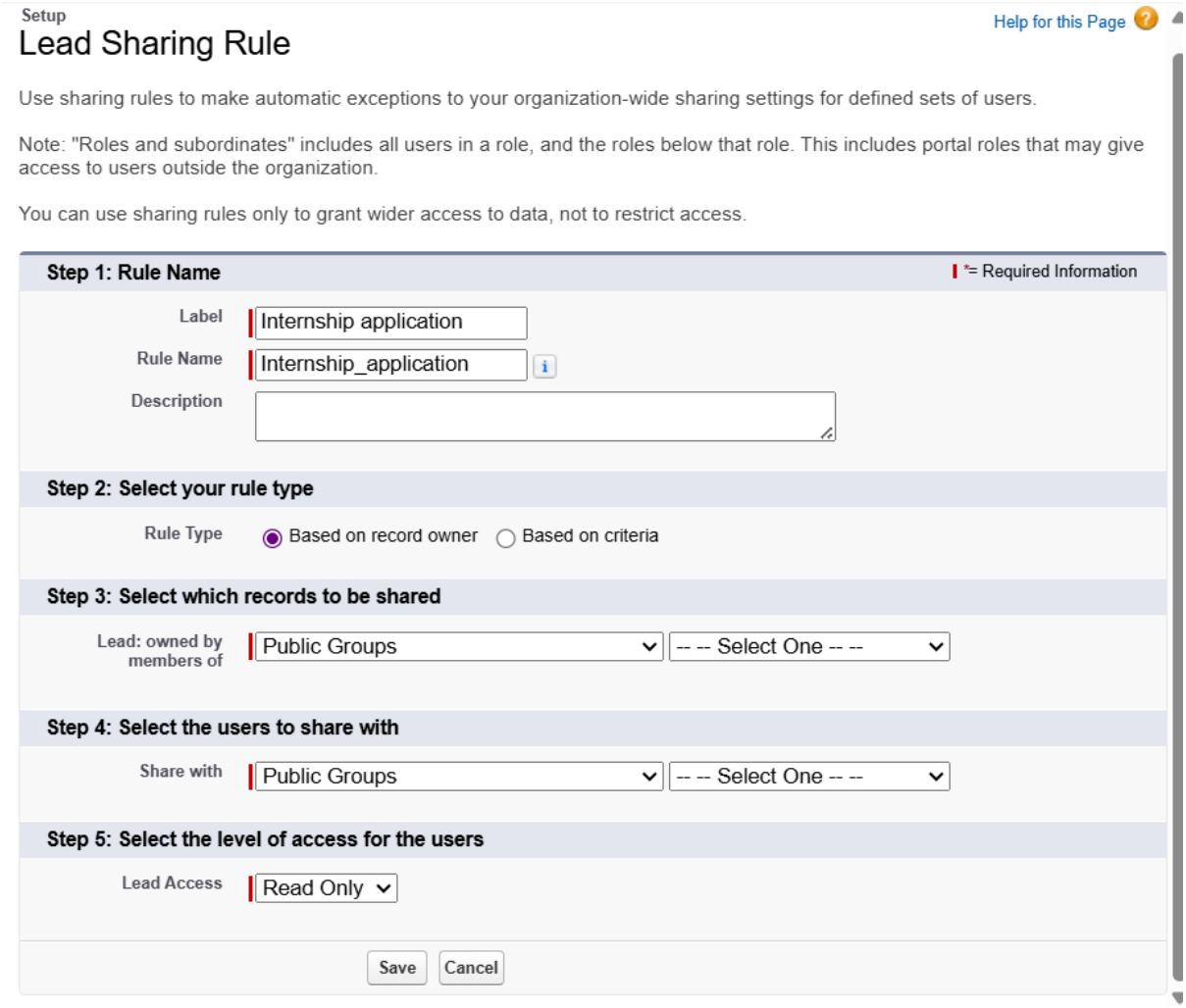
Purpose: Base-level record sharing.

- **Setup → Sharing Settings → Set:**
  - **Student__c → Private**
  - **Internship__c → Public Read Only**
  - **Internship Application__c → Controlled by Parent (Student)**

7️⃣ Sharing Rules

Purpose: Share records beyond OWD.

- **Example: Share all Internship Applications of a Placement Officer's students with the officer.**



8 Field Level Security (FLS)

Purpose: Control which users see or edit specific fields.

- **Setup → Object Manager → Field → Set Field-Level Security.**
- **Example: CGPA_GPA__c visible only to Placement Officers, not students.**

9 Session Settings

- **Setup → Security → Session Settings.**
- **Configure: Session timeout, login hours, etc.**
- **Example: Students automatically logout after 2 hours.**

10 Login IP Ranges

- **Setup → Profiles → Login IP Ranges.**
- **Example: Placement Officer can only login from office IP.**
- **Student can login from anywhere (or restricted if required).**

1 1️⃣ Audit Trail

Purpose: Track changes in org settings, objects, fields.

- **Setup → Security → View Setup Audit Trail.**
- **You can monitor who modified objects, fields, profiles, or sharing rules.**

Conclusion

Phase 9 successfully provided **data-driven insights** through reports and dashboards, while also reinforcing **security and compliance**. With these measures, the system became more **transparent, secure, and reliable**, empowering institutes to make informed decisions while safeguarding student information.