Phase 9: Reporting, Dashboards & Security Review

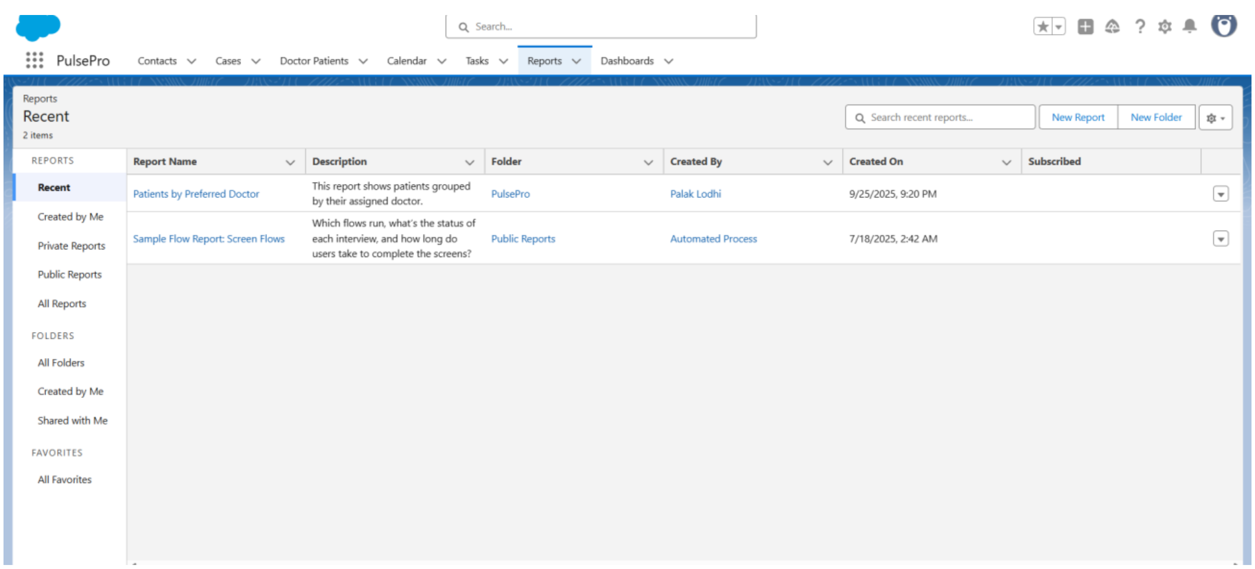
Reports

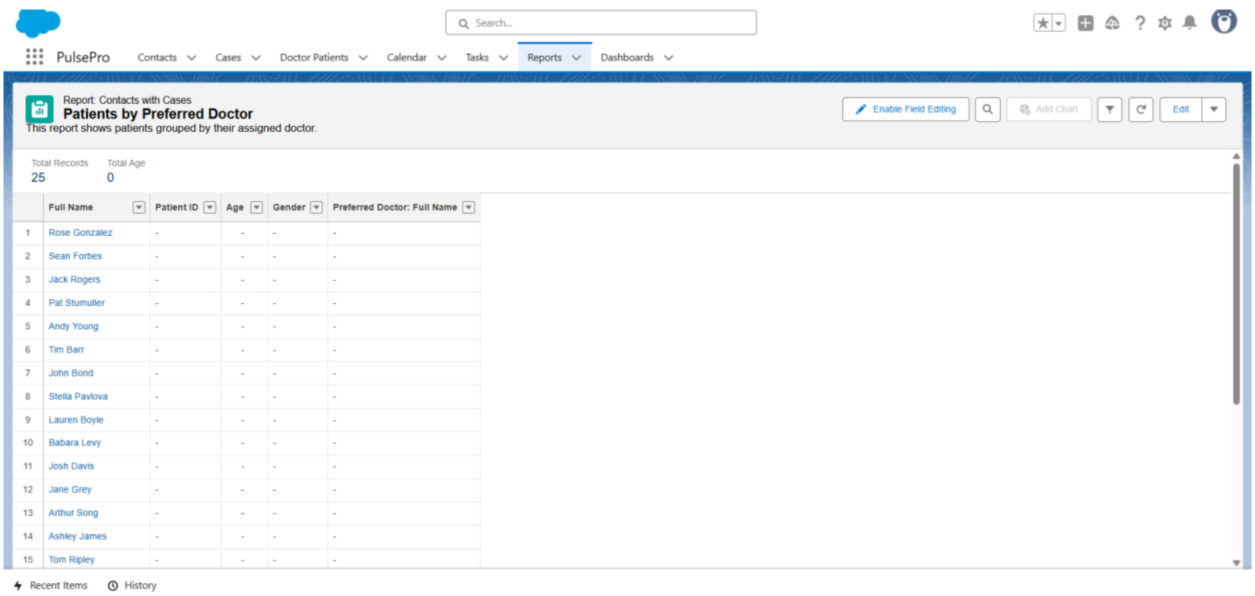
Reports allow users to analyze and display Salesforce data in a structured manner. Salesforce provides four main types of reports: **Tabular, Summary, Matrix, and Joined**.

For this project, a **Summary Report** was created to show patients along with their associated cases. This report includes key fields such as *Patient Name, Patient ID, Age, Preferred Doctor*, and *Case Details*.

- **Steps:**

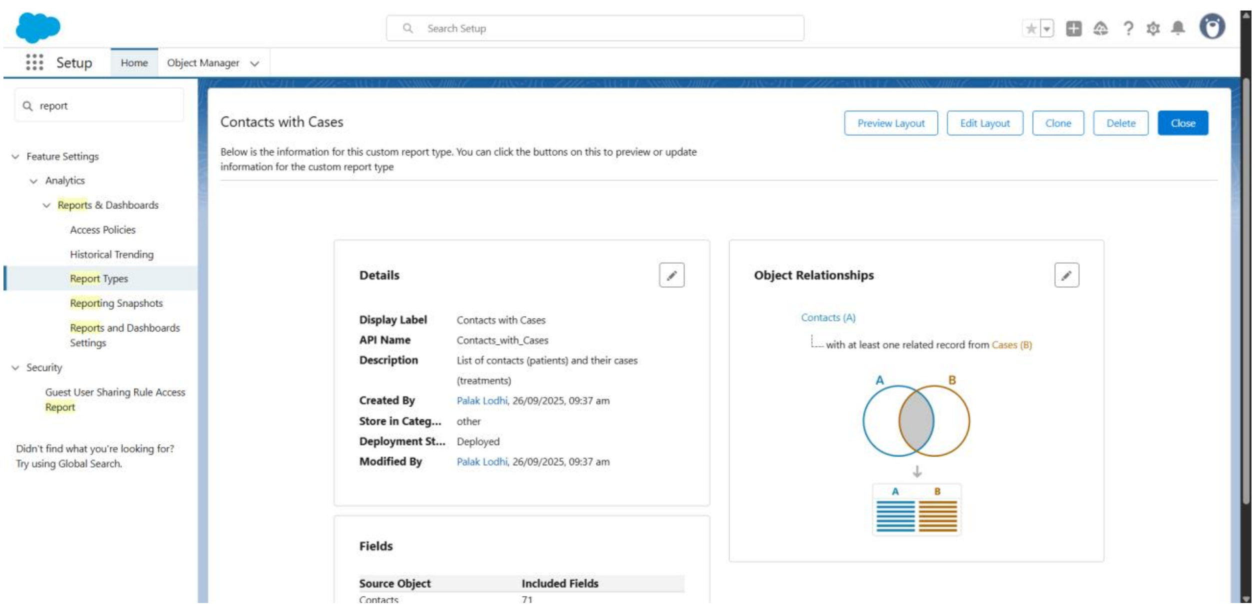
    1. Navigate to the **Reports** tab → New Report.
    2. Select **Contacts with Cases** report type.
    3. Add columns: *Patient Name, Patient ID, Age, Preferred Doctor, Case Number, Treatment Notes.*
    4. Group by **Preferred Doctor** to summarize patient distribution.
    5. Save the report in the **PulsePro folder**.





Report Types

Custom report types define which objects and fields are available in reports. For this project, the **standard "Contacts with Cases" report type** was sufficient. No custom report types were required.



Dashboards

Dashboards provide visual representation of report data. A **simple dashboard** was created to display patient distribution by preferred doctor.

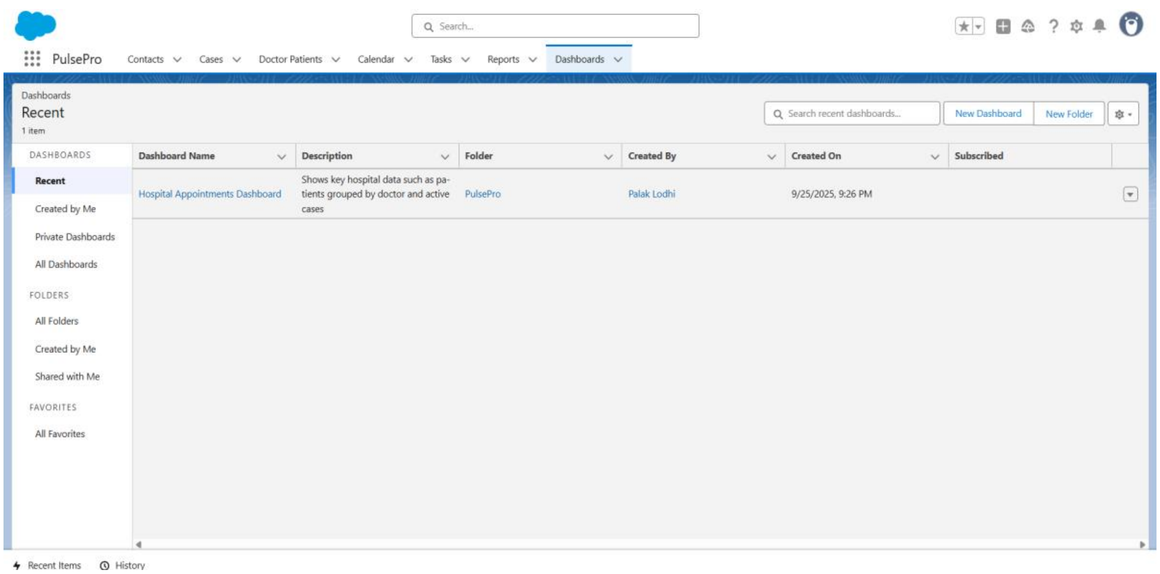
- **Steps:**

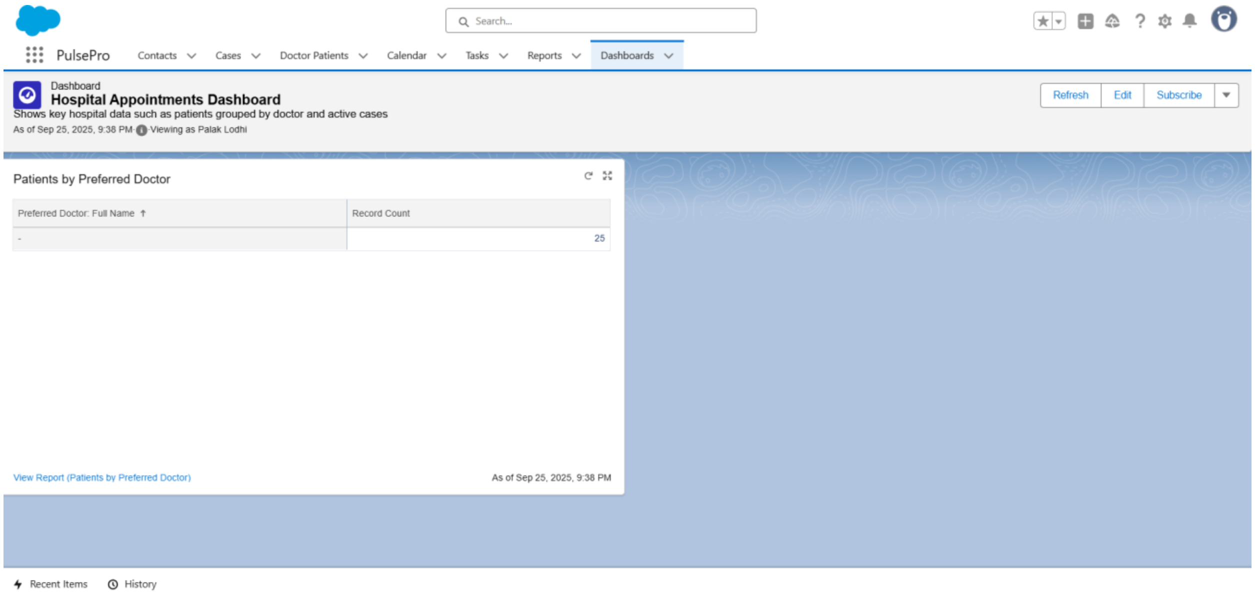
    1. Navigate to **Dashboards** → New Dashboard → Select **PulsePro folder**.

    2. Add **Lightning Table widget** using the Summary Report created earlier.

    3. Set **Title:** "Patients by Preferred Doctor".

    4. Save and run the dashboard.





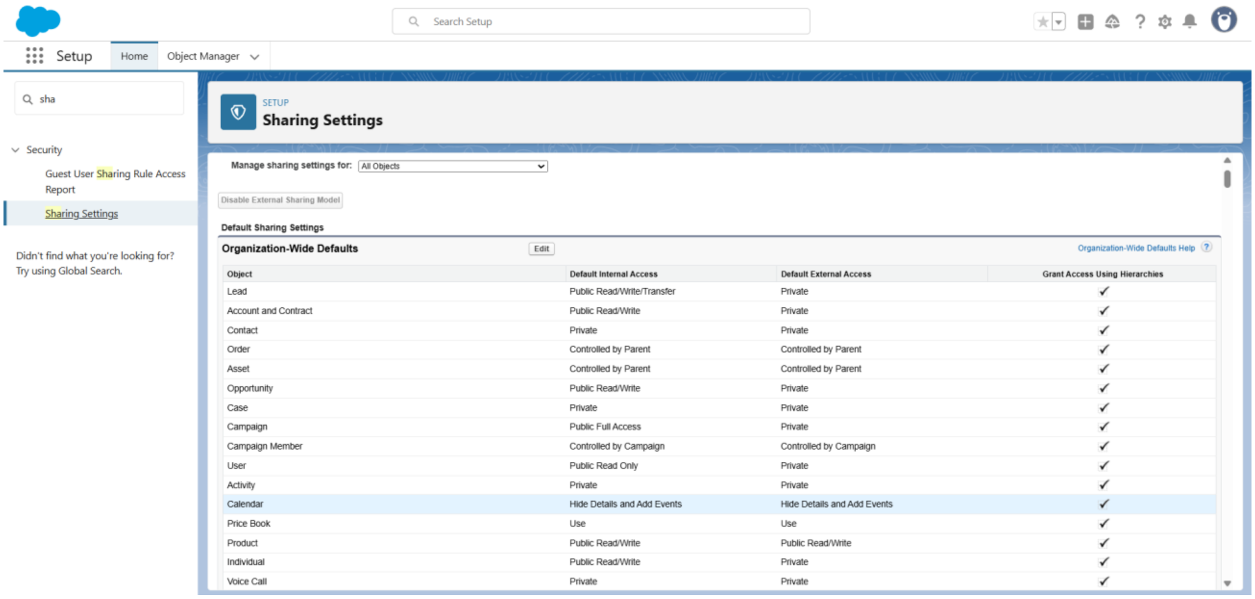
Dynamic Dashboards

Dynamic dashboards allow users to see data according to their access level. For this project, a **single standard dashboard** was sufficient, so dynamic dashboards were not implemented.

Sharing Settings

Sharing settings control access to records across users and profiles. **Organization-wide defaults** were set to ensure:

- Doctors can view their own patients and cases.
- Managers can view all records.
- Receptionists can create and view patient appointments.

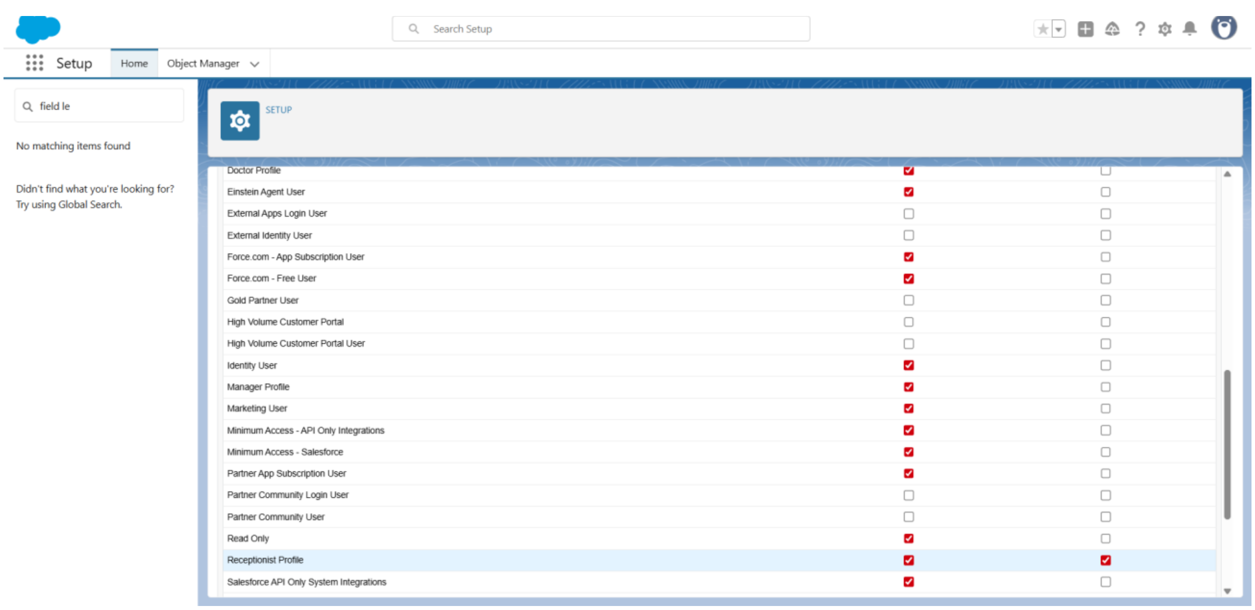


Field Level Security (FLS)

FLS restricts access to individual fields based on profiles. For this project:

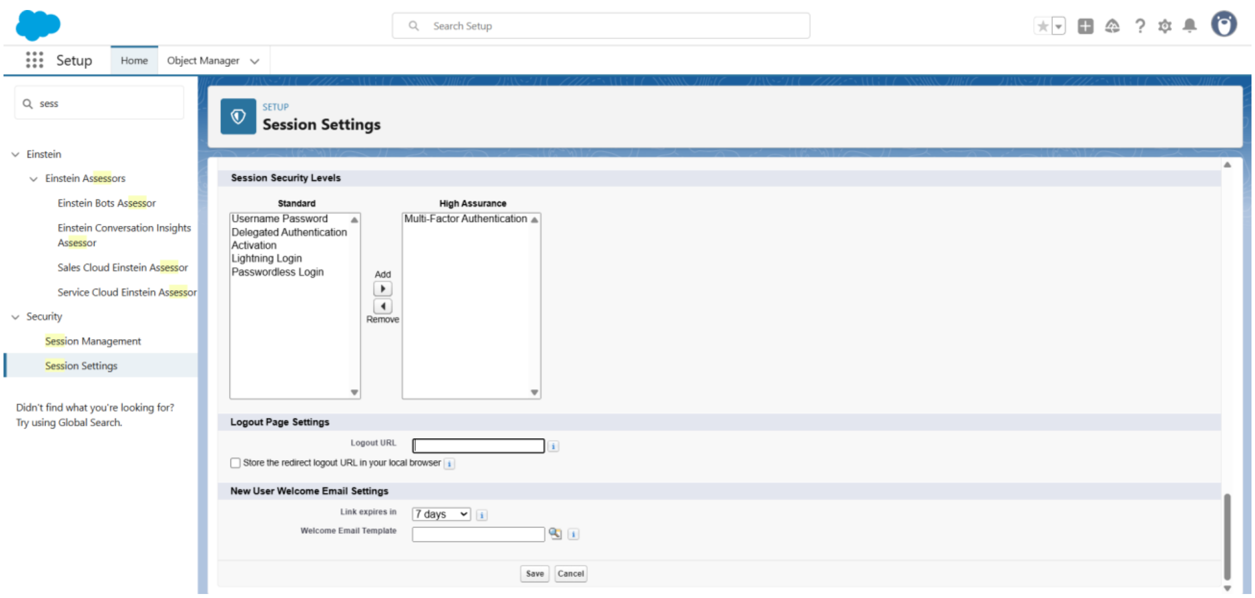
- Sensitive fields like *Patient ID, Medical History* are visible only to Doctors and Managers.

- Other fields like *Name, Age, Contact Info* are visible to all relevant users.



Session Settings

Session settings determine session timeout and security policies. Default session settings were used for this project.



Login IP Ranges

IP ranges restrict login to certain networks. For this project, no IP restrictions were configured to allow access from any location.

Audit Trail

The **Setup Audit Trail** allows tracking changes made in Salesforce. It provides accountability and helps monitor administrative activities.