# Phase 9:

# Reporting, Dashboards & Security Review

---

## 1) Why This Phase Matters

- Reports + Dashboards = **Storytelling with data**.

- Security = **Trust + Compliance** (must show awareness).

- **Strong reports** and **1 dashboard**.

---

## 2) Reports to Create

- ◆ **Report 1: Monthly CO$_2$ Saved**

  - Report Type: Eco Activities with Impact Scores.

  - Group by: Activity Date (Calendar Month).

  - Metric: Sum of CO$_2$ Saved.

  - Chart: **Line Chart**.
    Shows sustainability progress over time.

---

- ◆ **Report 2: Activity Breakdown by Type**

  - Report Type: Eco Activities.

- Group by: Activity Type (Tree Plantation, Recycling, Awareness Drive).

- Metric: Count of Activities.

- Chart: **Pie Chart**.
  Shows which type of activity is most common.

---

- **Report 3: Top Contributors (Leaderboard)**

  - Report Type: Eco Activities with Users.

  - Group by: User.

  - Metric: Sum of $CO_2$ Saved.

  - Sort: Descending.

  - Chart: **Bar Chart**.
    Highlights who contributed the most.

---

- **Report 4: Badge Distribution**

  - Report Type: Badges with Users.

  - Group by: Badge Level (Bronze, Silver, Gold).

  - Metric: Count of Badges.

  - Chart: **Bar Chart** (Bronze/Silver/Gold colors).
    Visualizes gamification aspect.

| Report Name | Description | Folder | Created By | Created On | Subscribed | |
|---|---|---|---|---|---|---|
| Monthly CO₂ Saved | | Public Reports | Jatin Awankar | 9/20/2025, 10:43 PM | | ▾ |
| Badge Distribution | | Public Reports | Jatin Awankar | 9/20/2025, 11:01 PM | | ▾ |
| Top Contributors (Leaderboard) | | Public Reports | Jatin Awankar | 9/20/2025, 10:57 PM | | ▾ |
| Activity Breakdown by Type | | Public Reports | Jatin Awankar | 9/20/2025, 10:46 PM | | ▾ |

With these 4 reports, I covered **time trends, distribution, leaderboard, gamification**.

---

## 3) Dashboard Setup

Create a Dashboard named: **"GreenTrack Sustainability Dashboard"**

- Add Components:

    - **Line Chart** – Monthly CO₂ Saved.

    - **Pie Chart** – Activity Breakdown.

    - **Bar Chart** – Top 5 Contributors.

    - **Bar Chart** – Badge Distribution.

- Dashboard Settings:

    - View As: "NGO Manager" (so managers see org-wide data).

    - Refresh: Daily.

    - Add Green/Eco theme color scheme.

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed | |
|---|---|---|---|---|---|---|
| GreenTrack Sustainability Dashboard | | GreenTrack | Jatin Awankar | 9/21/2025, 11:33 AM | | ▾ |

---

## 4) Security Review (Optional)

**Data security**. In Developer Edition, keeping it simple:

- **Field Level Security (FLS):**

  - Eco Activity → Only NGO Manager/Admin can see $CO_2$ impact numbers.

  - Participants see only their own activities.

- **Sharing Settings (OWD):**

  - Eco Activity: Private.

  - Impact Score: Controlled by Parent (Eco Activity).

  - Badge: Public Read Only.

- **Login IP Ranges (Optional):**

  - Admin → Restrict by IP range (demo purpose).

- **Audit Trail:**

  - Setup → View Audit Trail → Document this screenshot.

---

## 5) Testing Checklist

- Login as NGO Manager → Dashboard shows org-wide contributions.

- Login as Participant → Only personal activities visible.

- Verify dashboard refresh works.

- Run Audit Trail → See admin actions logged.