

PROJECT MANAGEMENT APP

KULDEEP UPADHYAY

Phase 9: Reporting, Dashboards & Security Review

Goal: Generate insights and ensure security of project data.

- Create reports for project progress, overdue tasks, and milestones.
- Generate dashboards for managers showing KPIs and resource use.
- Design dynamic dashboards with role-based visibility.
- Define report types linking Projects and Tasks.
- Apply field-level security for sensitive project fields.
- Set login IP ranges and session timeout policies.
- Enable audit trail to monitor admin changes.
- Test data visibility with different profiles and roles.
- Conduct a security review before production release.

The screenshot displays a web application interface for project management. At the top, there's a navigation bar with a search bar and several icons. Below the navigation bar, the main content area is divided into two sections. The left section, titled 'Project', shows details for a project named 'This is my first project'. It includes fields for Project Name, Project Description, Project Type, Fixed Price, Start Date, End Date, Project Status, and Hours. The right section, titled 'Activity', shows a list of activities for the project, including a section for 'Upcoming & Overdue' and a section for 'September 2025'.

Project Management | Projects | Timesheets | Reports

Search...

Project: This is my first project

New Contact | Edit | New Opportunity

Related | Details

Project Name: This is my first project | Account Name: KULDEEP UPADHYAY

Project Description: This is the description | opportunity: KULDEEP

Details

Project Type: | Project Status: Ongoing

Fixed Price: |

Start Date: 9/25/2025 |

End Date: 1/1/2026 |

Hours

Total Hours: 80.00 |

Hours Worked To Date: 45.00

Remaining Hours: 35.00

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

September 2025 | Last Month

[No subject] 6:00 AM | Sep 25

You had an event

No more past activities to load.

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

All Folders

7 items

Q Search all folders...

New Report

New Folder

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REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Spring '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Summer '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Summer '22	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Winter '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Enablement Dashboard Reports Spring '24	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Enablement Dashboard Reports Summer '24	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

Public Reports

7 items

Q Search public reports...

New Report

New Folder

⚙️

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

All Reports

31 items

Q Search all reports...

New Report

New Folder

⚙️

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

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