

PHASE 9: REPORTING, DASHBOARDS & SECURITY REVIEW

for Home Maintenance and Repair Management System

1. Reports

- Various report formats explored:
 - Tabular Reports: Listing all pending maintenance requests or assets due for servicing.
 - Summary Reports: Grouped counts such as number of requests per asset or vendor.
 - Matrix Reports: Comparing requests by status vs. assigned vendors.
 - Joined Reports: Combining Asset details with related maintenance requests and vendor info.
- Example Reports Created:
 - Requests by Asset: Summary report showing number of requests per asset.
 - Vendor Performance: Requests handled by each vendor, grouped by request status.

REPORT

New Report

Assets with Maintenance Requests and Vendors

↶ ↷ ⚙ Add Chart Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

| Asset: ID | Location | Start Date | Asset: Asset Name | Maintenance Request: Maintenance Request Name | Vendor: Vendor Name | Maintenance Request: ID |
|---------------------|-------------------|----------------|-------------------|---|---------------------|-------------------------|
| a01d200009yc7vi (1) | Visakhapatnam (1) | 29/09/2025 (1) | Roof Leakage | Roof Leakage | Vendor D | a00d200001LnCgA |
| | | Subtotal | | | | |
| | Subtotal | | | | | |
| | Total (1) | | | | | |

Fields

Outline

Filters

Groups

GROUP ROWS

Asset: ID

Location

Start Date

GROUP COLUMNS

Columns

Add column...

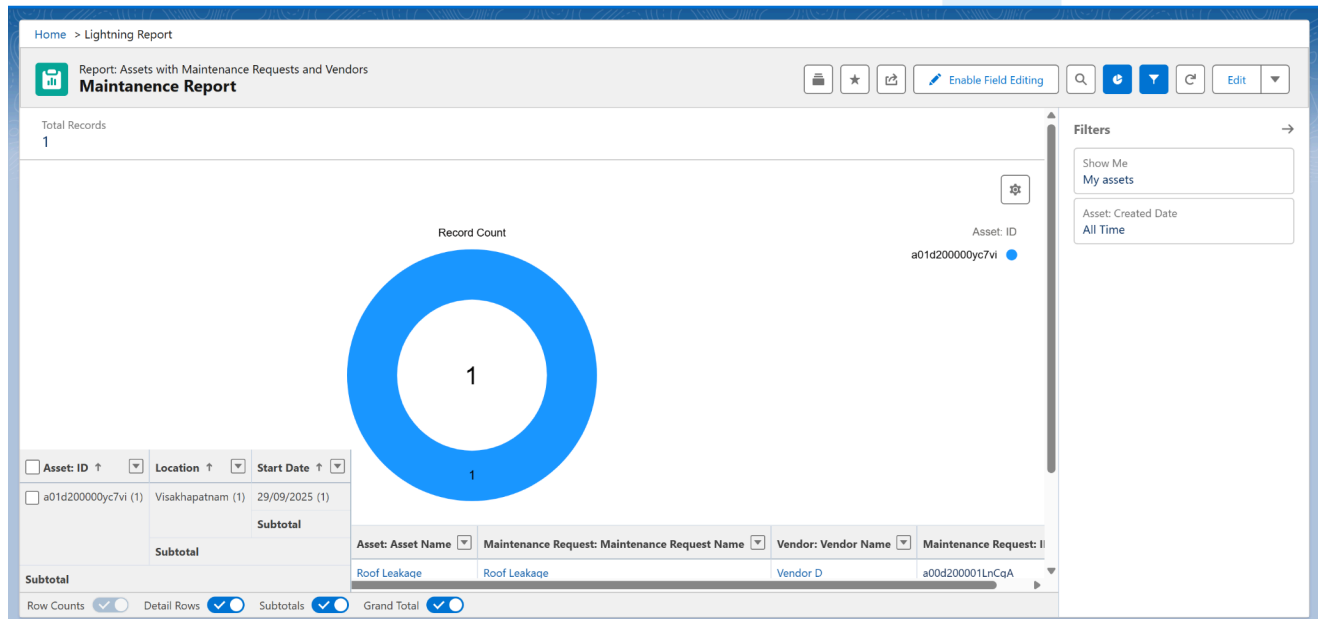
Asset: Asset Name

Maintenance Request: Maintenance Request Name

Vendor: Vendor Name

Maintenance Request: ID

Row Counts Detail Rows Subtotals Grand Total

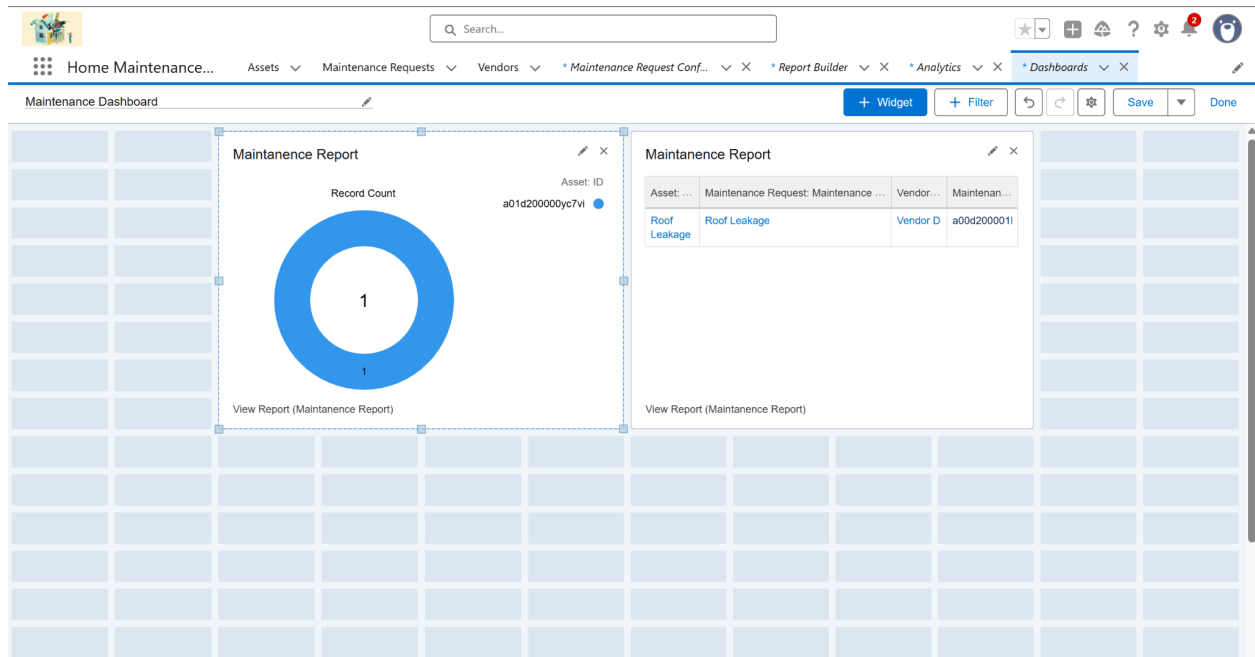


2. Custom Report Types

- Created custom report types to link Asset__c, Vendor__c, and Maintenance_Request__c.
- This enables comprehensive reporting like “Requests per Asset with Vendor Details” and “Requests by Status and Vendor.”
- Ensures users see relevant data and fields, enhancing report clarity.

3. Dashboards

- Dashboards built to visualize key KPIs:
 - Bar Chart: Requests pending per asset.
 - Pie Chart: Distribution of requests by status (Open, In Progress, Resolved).
 - Number Metric: Total requests completed this month.
- Management Dashboard:
 - High-level view of overall maintenance activity, vendor performance, and asset status.



4. Dynamic Dashboards

- Role-Based Visibility:
 - Managers see all requests and vendor data.
 - Asset/Vendor managers view only their assigned assets and related requests.
 - Security filters ensure data confidentiality and role-specific reporting.

5. Sharing Settings

- Organization-Wide Defaults (OWD):
 - Asset__c: Public Read Only – all users can view asset data.
 - Maintenance_Request__c: Private – only record owners and managers can view/edit.
 - Vendor__c: Controlled by Parent or custom sharing rules for vendor managers.
- Sharing Rules:
 - Asset Owners (e.g., property managers) can view all requests for their assets.
 - Vendor managers are granted access to their respective requests.

6. Audit Trail

- Enabled Salesforce Setup Audit Trail:
 - Tracks configuration changes like sharing rule updates, object field modifications, or workflow alterations.
 - Regular audits for compliance and troubleshooting are scheduled.
 - Security Reviews:
 - Session timeout policies, IP restrictions, and Field-Level Security (FLS) are reviewed and enforced to ensure data security.
 - User access levels are regularly tightened based on roles.
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Achievements in Phase 9:

- Developed detailed reports and dashboards for tracking maintenance requests, vendor performance, and asset health.
- Implemented role-based dynamic dashboards for tailored data access.
- Strengthened security with organization-wide settings, sharing rules, FLS, and audit trail management.
- Enabled actionable insights for operational efficiency while safeguarding sensitive data.