

## Phase 9 — Reporting, Dashboards & Security Review

---

### 1. Objective

Phase 9 focuses on providing **insights into application data** and ensuring **proper security and access control** for users.

- **Reports and dashboards** help monitor lost and found items.
- **Security settings** maintain data integrity and privacy.

### 2. Reports

#### ◆ Lost Items Report

- **Report Type:** Lost\_Item\_\_c (custom report type)
- **Format:** Summary
- **Columns:** Item Name, Lost Date, Location, Description, Owner
- **Filters:** Lost Date = *THIS MONTH* (optional), Status = *Open*
- **Grouping:** By Location (*optional sub-group by Lost Date*)

The screenshot shows a Salesforce report interface. At the top, there's a header with a cloud icon, 'Developer Edition', and 'Welcome'. Below the header, the title 'Report Lost\_Items' and 'New Lost\_Items Report' is displayed. A search bar and various navigation icons are on the right. The main area shows a table with two records. The columns are 'Lost Item Name', 'Location', 'Item Name', and 'Lost Date'. The first record is 'ID card' located at 'Pragati Engineering College' with item name 'ID card' and lost date '9/23/2025, 12:00 PM'. The second record is 'Phone' located at 'Pragati Engineering College' with item name 'Phone' and lost date '9/8/2025, 12:00 PM'.

	Lost Item Name	Location	Item Name	Lost Date
1	ID card	Pragati Engineering College	ID card	9/23/2025, 12:00 PM
2	Phone	Pragati Engineering College	Phone	9/8/2025, 12:00 PM

---

#### ◆ Found Items Report

- **Report Type:** Found\_Item\_\_c (custom report type)
- **Format:** Summary
- **Columns:** Item Name, Found Date, Location, Description, Owner
- **Filters:** Found Date = *THIS MONTH* (optional), Status = *Open*
- **Grouping:** By Location (*optional sub-group by Found Date*)

The screenshot shows the Smart Lost & Found Dashboard interface. At the top, there's a navigation bar with links for LostItems, FoundItems, ClaimRequests, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main area displays a report titled "New Found Items Report". The report has a header row with columns: FoundItem Name, Found Date, Location, and Status. Two items are listed: "Chain" found on 9/10/2025 at Pragati Engineering College with status "Unclaimed" and "Umbrella" found on 9/15/2025 at Pragati Engineering College with status "Matched". Below the report is a link labeled "View Report (New Found Items Report)".

#### ◆ Claim Requests Report

- **Report Type:** ClaimRequest\_\_c (standard)
- **Format:** Summary
- **Columns:** Item Name, Created Date, Approval Status, Claimant Name, Owner
- **Filters:** Approval Status = *Pending*, Created Date = *LAST 30 DAYS* (optional)
- **Grouping:** By Approval Status (*optional sub-group by Created Date*)

FoundItem Name	Found Date	Location	Status
Chain	9/18/2025, 12:00 PM	Pragati Engineering College	Unclaimed
Umbrella	9/15/2025, 12:00 PM	Pragati Engineering College	Matched

### 3. Charts

Charts were added to reports for **visual summaries**:

- **Lost Items** → Column chart by *Location*
- **Found Items** → Column or Pie chart by *Location*
- **Claim Requests** → Pie chart by *Approval Status*

**Requirements for Charts:**

- Reports must be in **Summary or Matrix** format.
- At least one record must exist in the object.
- Must be viewed in **Lightning Experience**.

### 4. Dashboards

Dashboards provide an **overview of Smart Lost & Found data**.

**Components included:**

- Lost Items per Location
- Found Items per Location

- Pending Claims by Approval Status

Dashboards also allow **filtering by date or location** for quick insights.

The screenshot shows a software application window titled "Smart Lost & Found...". The top navigation bar includes links for "LostItems", "FoundItems", "ClaimRequests", "Reports", and "Dashboards". The "Dashboards" tab is currently selected. On the left, there's a sidebar with categories: "Recent", "Created by Me", "Private Dashboards", "All Dashboards", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites", "All Favorites". The main content area displays a table of recent dashboards:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Smart Lost & Found 2 Dashboard		Private Dashboards	CHAVVAKULA LASYAVALLI	9/26/2025, 8:21 AM	
Smart Lost & Found Dashboard		Private Dashboards	CHAVVAKULA LASYAVALLI	9/26/2025, 8:02 AM	

## 5. Security Review

### ◆ Sharing Settings

- Objects set to **Private** → users see only their records.
- **Admins** have full access.

### ◆ Field-Level Security

- Sensitive fields (e.g., *Item Description*) restricted to appropriate profiles.

**Outcome:** Ensures **proper access control and data privacy** while enabling reports and dashboards.

## 6. Conclusion

- **Reports, charts, and dashboards** provide clear visibility into lost items, found items, and claims.
- **Security settings** protect data and control user access.

- Advanced features like **Dynamic Dashboards**, **Audit Trail**, and **Login IP Ranges** were not implemented, as they were **not required** for this project's scope.