

# Library Management Phase 9: Reporting, Dashboards & Security Review

## Step 1: Reporting

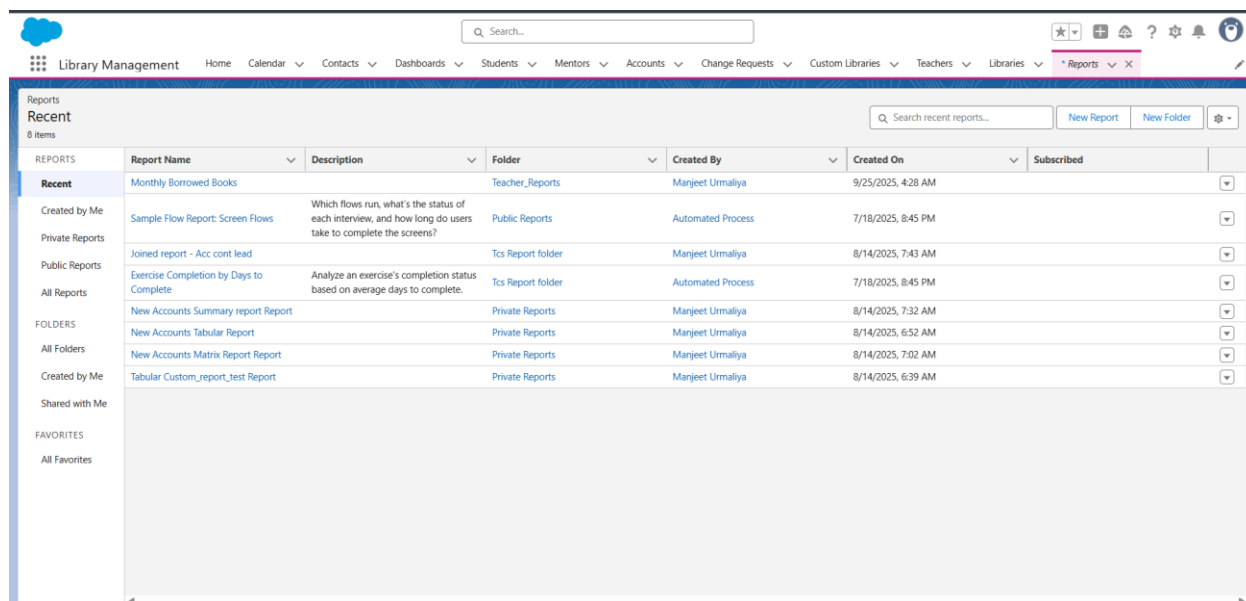
A Report is a list or summary of records in Salesforce that helps you analyze library data.

- Reports let you filter, sort, group, and summarize your Library Management data.
- Example: You can create a report to see all books borrowed this month or the top books borrowed by Teachers vs. Students.

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### Steps

- Go to the App Launcher → search “Reports” → click Reports.
- Click “New Report” - Monthly Borrowed Books.
- Click “New Report”.
- Select the Report Type - Teacher
- Click Continue.
- Add Filters
- Add Columns
- Group Data (optional)
  - Example: Group Borrow Requests by Book or by Member (Teacher/Student).
- Summarize (optional)
  - Add totals, averages, or counts (like total borrowed books per Teacher).
- Click Save & Run → Give the report a name → Choose a folder to save it in.



## Step 2: Dashboards

What it is:

A Dashboard is a visual board that displays charts, numbers, and tables built from your Reports. It helps Teachers, Librarians and Management instantly see performance trends (for example: most borrowed books, top students, pending returns).

Dashboard Components You Can Add

Charts – Bar, Pie, Line charts to show trends.

Gauges – Show progress toward a target (e.g. % of books returned on time).

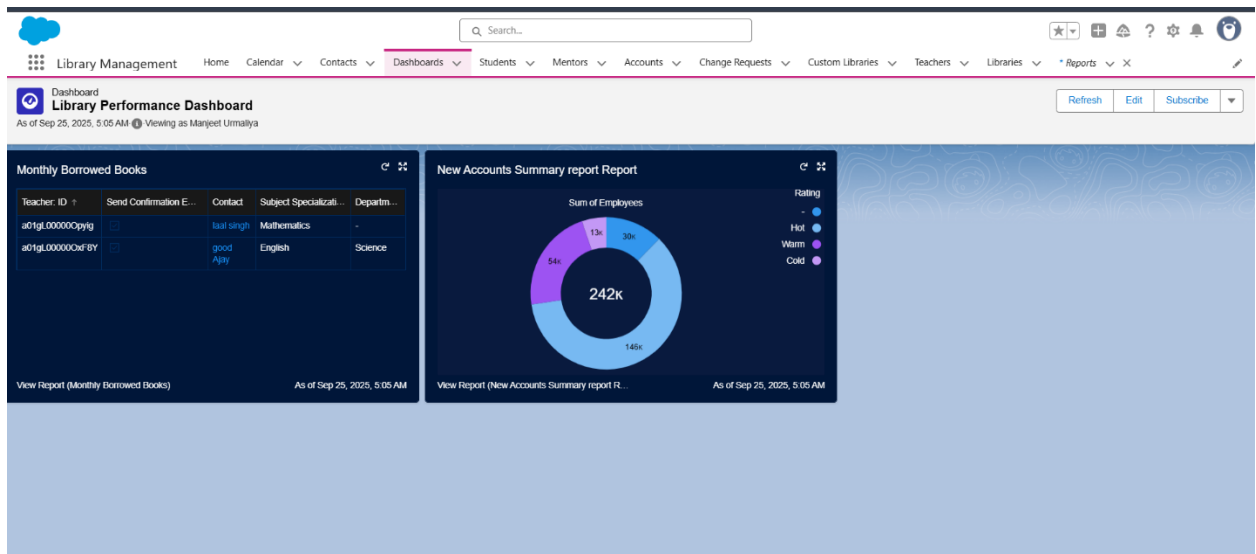
Metrics – One key number (e.g. total borrowings this month).

Tables – Raw report data in a grid.

Steps (Click by Click)

- Go to the App Launcher → type “Dashboards” → click Dashboards.
- Click “New Dashboard”.
- Enter Dashboard Name – e.g. Library Performance Dashboard or Teacher Engagement Dashboard.
- Choose a Folder (select the folder you created earlier for Reports/Dashboards).
- Click “Create”.
- Click “+ Component” (to add your first chart, metric or table).

- Select a Report you already built (for example: “Books Borrowed This Month” or “Top Students”).
- Choose Visualization Type:
  - Bar Chart
  - Pie Chart
  - Gauge
  - Metric
  - Table
- Configure Data Display:
  - Choose which fields, groupings, and filters you want for this chart or metric.
  - Click “Add”.
  - Repeat “+ Component” for more charts/metrics if needed.
  - Click “Save” → then “Done”.
  - Click “Refresh” anytime to pull in the latest data.
- Result:
  - Your dashboard now shows live numbers and visuals from your Salesforce reports for Teachers, Students and Librarians.



### Step 3: Field-Level Security (Library Management)

What it is:

Field-Level Security controls who can see or edit individual fields on a record.

It protects sensitive data like Teacher Contact, Student DOB, Library Fines, Book Costs, etc., so only the right roles can view or update them.

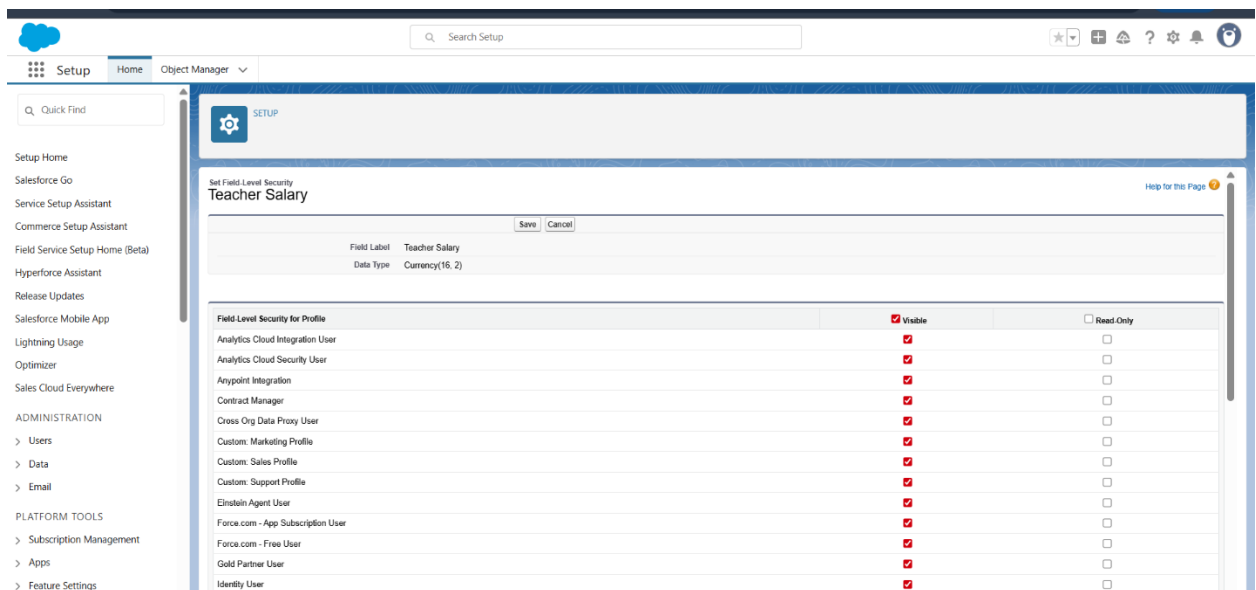
Steps (Click by Click)

- Go to Setup → Object Manager.
- Select your Object (example: Student or Teacher or Book).
- Click “Fields & Relationships”.
- Click the field you want to protect (example: Student DOB).
- Click “Set Field-Level Security”.
- For each Profile:
- Visible → can see the field.
- Read-Only → can see but cannot edit.
- Hidden → cannot see at all.
- (Example: For Student DOB → Visible to Teacher & Librarian profiles, Hidden for Student profile.)
- Click “Save”.
- Repeat steps 4–7 for other sensitive fields like Teacher Salary, Book Purchase Price, Library Fine Amount, etc.

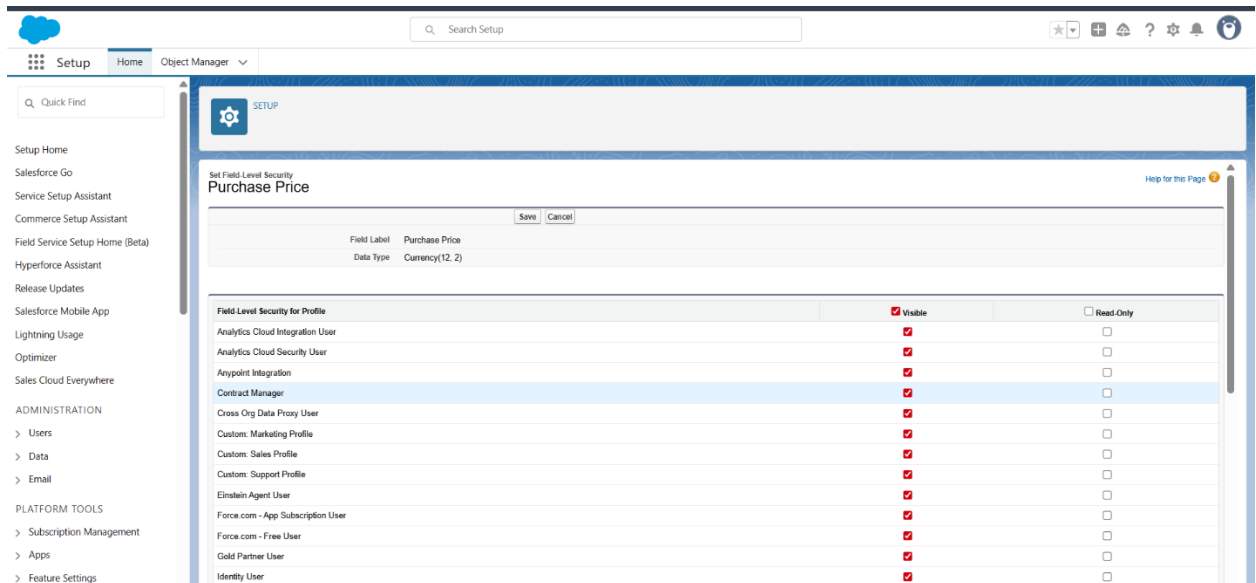
Result:

Only authorized roles (Teacher, Librarian, Admin) can view or edit those sensitive fields. Students or other profiles see nothing or read-only according to your settings.

- Setup → Object Manager → Teacher → Fields & Relationships → New.
- Choose Field Type = Currency → Next.
- Field details:
- Field Label: Teacher Salary
- Field Name: Teacher\_Salary\_\_c
- Length / Decimal Places: choose e.g. 16,2 (or your org standard)
- Help Text: Annual salary in local currency. Visible to Admin only.
- Description: Stores salary for payroll/audit
- Set Field-Level Security (during creation)
- On the Set Field-Level Security screen (shown while creating), pick visibility per profile:
- visible for all
- Save.



- Setup → Object Manager → Student → Fields & Relationships → New.
- Field Type = Currency → Next.
- Field Label: Purchase Price
- Field Name: Purchase\_Price\_\_c
- Length/Decimals: e.g., 12,2
- Help Text: Cost price of the book — visible to Librarians & Admins. Read-only for Teachers.
- Set Field-Level Security (during creation)
- Choose visibility: all
- Save



- Setup → Object Manager → Mentor → Fields & Relationships → New.
- Field Type = Currency → Next.
- Field Label: Fine Amount
- Field Name: Fine\_Amount\_\_c
- Help Text: Fine charged for overdue returns — visible to Librarians only.
- Set Field-Level Security
- Visibility choices: for all → Save.

