

MediConnect — Phase 9 : Reporting, Dashboards & Security Review

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Date: 2025-10-06

1. **Objective** — To analyze healthcare data using Salesforce Reports & Dashboards.
2. **Created Reports**
 - Appointments by Doctor (Summary Report)
 - Appointments by Status (Matrix Report)
 - Patient-Doctor List (Tabular Report)
3. **Dashboard**
 - Healthcare Overview Dashboard (with components: bar, pie, line, table)
4. **Security Review**
 - Field-Level Security checked for sensitive fields.
 - Organization-wide defaults (OWD) kept private for Patient data.
 - Audit Trail and Login History verified for compliance.

Objective

The main objective of this phase is to create insightful **reports and dashboards** that help the MediConnect healthcare system's stakeholders — including administrators, doctors, and management — make informed decisions based on accurate and visualized data. In addition, this phase ensures **data security, access control, and compliance** with healthcare information privacy standards within Salesforce.

Reports

Reports are essential for analyzing patient appointments, tracking doctor performance, and understanding workload distribution.

In MediConnect, we created custom report types and reports that combine Patient, Doctor, and Appointment data.

Custom Report Type Creation

Steps:

1. Navigate to **Setup → Report Types → New Custom Report Type**
2. Choose **Primary Object:** Appointment__c
3. Choose **Related Object:** Patient__c (via the lookup relationship Patient__c)
4. Deployment Status: **Deployed**


5. Store in **Healthcare Reports** folder

Purpose:

To generate reports that display both Appointment and Patient information in a single unified report structure.

Result:

A new report type named **Appointments with Patients** becomes available in the “Create New Report” dialog.


 **Custom Report Types**

Appointments with Patients

[Preview Layout](#) [Edit Layout](#) [Clone](#) [Delete](#) [Close](#)

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details



Display Label Appointments with Patients

API Name Appointments_with_Patients

Description This report type shows appointments along with related patient and doctor details for MediConnect.


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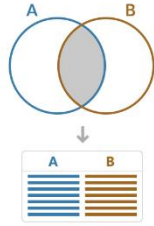
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Object Relationships



Appointments (A)

with at least one related record from Patients (B)



Appointments by Status (Matrix Report)

Report Type: Appointments with Patients

Format: Matrix

Grouped Rows: Doctor__r.Name

Grouped Columns: Status__c

Field Selected: Appointment_Date__c, Patient__r.Name, Status__c

Save As: *Appointments Status Overview*

Purpose:

To provide a quick visual summary of how many appointments are *Scheduled*, *Completed*, or *Canceled* per doctor.

Business Use:

Helps hospital administrators understand the performance and workload of each doctor.

Output Insight:

Doctors with higher “Completed” counts are performing efficiently; high “Canceled” counts may indicate scheduling issues.

Patient Distribution by Doctor (Tabular Report)

Report Type: Appointments with Patients

Format: Tabular

Fields Included:

- Patient__r.Name
- Doctor__r.Name
- Appointment_Date__c

Save As: *Patient-Doctor List*

Purpose:

Provides a list of all patients and their corresponding doctors. This helps reception and management quickly identify doctor-patient mappings.

Reports							
Recent							
8 items							
<div><div>Q</div><div>Search recent reports...</div><div>New ReportNew Folder⚙</div></div>							
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Appointments and Doctors Overview		Private Reports	Neha Doddi	10/7/2025, 9:31 AM		
Created by Me	Patient vs Doctor Appointment Matrix		Private Reports	Neha Doddi	10/7/2025, 9:22 AM		
Private Reports	Appointments by Doctor		Private Reports	Neha Doddi	10/7/2025, 9:16 AM		

Dashboards

Dashboards provide a graphical and visual representation of report data for real-time monitoring and analysis.

Creating the Dashboard

Steps:

1. Navigate to **Dashboards** → **New Dashboard**
2. Enter **Name:** *Healthcare Overview Dashboard*
3. **Folder:** *Public Dashboards (or Healthcare Reports)*
4. Add components as listed below.

Dashboard Components

Component Type	Source Report	Visualization	Purpose
Bar Chart	Appointments Status Overview	Horizontal Bar	Displays number of appointments handled by each doctor
Pie Chart	Appointments Status Overview	Pie	Shows appointment distribution by status (Scheduled, Completed, Canceled)

Dashboard Purpose

The **Healthcare Overview Dashboard** acts as a one-stop visual monitoring tool for:

- Tracking doctor performance
- Monitoring appointment completion rates
- Understanding workload trends
- Identifying top-performing doctors and high-frequency patients

Security Review

Data privacy and access control are critical in any healthcare system.

The following Salesforce security mechanisms were implemented to safeguard patient data.

Organization-Wide Defaults (OWD)

Navigation: Setup → Sharing Settings

Object	Default Access	Reason
Patient	Private	Protect sensitive patient data
Doctor	Public Read Only	Allow access to view doctors' schedules
Appointment	Private	Only related doctor and admin can view

Role Hierarchy

Role	Permissions	Access Level
System Administrator	Full Access	Manage all data
Doctor	Read/Edit own appointments	Limited to related records
Receptionist	Read-only for appointments	Can schedule appointments
Patient	No access to other data	Self-only via portal

Field-Level Security (FLS)

Sensitive fields such as:

- Medical_History__c
- Patient_Email__c
- Phone__c

are hidden from lower roles like Receptionist and made visible only to Doctors and Admins.

Audit Trail

Navigation: Setup → View Setup Audit Trail

Tracks configuration changes and ensures compliance by logging:

- Report and dashboard modifications
- Data imports and user activities
- Permission changes

Login and Session Settings

- Defined **Login IP Ranges** for admins.
- Configured **Session Timeout = 30 minutes**.
- Enabled **Secure Cookies** and **Two-Factor Authentication** for admin users.