Phase 9 — Reporting, Dashboards & Security Review

Objective: Provide business insights and secure access controls for vendors and purchase orders (POs).
Deliverable: Reports, Dashboards, Security baseline (sharing, FLS, session & login controls, audit trail).

Sample Data

Vendors

VendorExternalId	Name	Email	Rating	DeptAssigned
VEND-001	Acme Supplies	acme@example.com	A	Procurement
VEND-002	Blue Widgets	blue@example.com	A	Manufacturing
VEND-003	Green Parts	green@example.com	B	Procurement
VEND-004	Red Systems	red@example.com	C	IT
VEND-005	Gold Traders	gold@example.com	A	Finance
VEND-006	SilverLine	silver@example.com	B	Procurement

Purchase Orders

PO_External_Id	Name	VendorExternalId	Dept	Amount (INR)	Status	Expected_Delivery
PO-101	PO-101	VEND-005	Finance	1,200,000	Submitted	2025-10-05
PO-102	PO-102	VEND-001	Procurement	750,000	Approved	2025-09-30
PO-103	PO-103	VEND-002	Manufacturing	450,000	Completed	2025-09-15
PO-104	PO-104	VEND-001	Procurement	320,000	Completed	2025-09-12
PO-105	PO-105	VEND-006	Procurement	600,000	Submitted	2025-10-02

PO_External_Id	Name	VendorExternalId	Dept	Amount (INR)	Status	Expected_Delivery
PO-106	PO-106	VEND-005	Finance	2,500,000	Submitted	2025-11-01
PO-107	PO-107	VEND-003	Procurement	90,000	Draft	2025-09-20
PO-108	PO-108	VEND-004	IT	50,000	Completed	2025-08-30
PO-109	PO-109	VEND-002	Manufacturing	900,000	Approved	2025-10-10
PO-110	PO-110	VEND-001	Procurement	180,000	Completed	2025-09-08

Note: You can import these using Data Loader or Data Import Wizard; map Vendor lookup via VendorExternalId.

Part A — Reports (Step-by-Step)

1. Vendor Spend Report

- **Use case:** Management wants to see total vendor spend.
- **Steps:**
    1. App Launcher → Reports → New Report
    2. Choose report type: Vendors with Purchase Orders (or Purchase Orders report type)
    3. Change format to **Summary**
    4. Add Columns:
        - Vendor__r.Name (Vendor Name)
        - Vendor__r.Rating__c (Rating)
        - Amount__c
        - Name (PO Name — optional)
    5. Group Rows by Vendor Name
    6. Summarize Amount__c → SUM
    7. Filter: Status__c = Completed (or Status__c IN ('Completed','Approved'))
    8. Sort by SUM(Amount__c) Desc
    9. Run → Save as **Vendor Spend Report** in folder Vendor Reports
- **Expected Results:**

- Gold Traders → 3,700,000 (PO-101 + PO-106)
- Blue Widgets → 1,350,000 (PO-103 + PO-109)
- Acme Supplies → 500,000 (PO-104 + PO-110)

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2. PO Status by Department

- **Use case:** Operations wants to see PO counts per status per department.
- **Steps:**
  1. Reports → New Report → Purchase Orders
  2. Format: Matrix (Department as rows, Status as columns) or Summary grouped by Department then Status
  3. Columns: Department__c, Status__c, Name (Count)
  4. Filters: Date range as required
  5. Run → Save as **PO Status by Department**
- **Expected Results (Sample):**
  - Procurement: Submitted 2, Approved 1, Completed 3, Draft 1
  - Finance: Submitted 2
  - Manufacturing: Completed 1, Approved 1
  - IT: Completed 1

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3. High-Value POs Report

- **Definition:** POs where Amount__c >= 500,000
- **Steps:**
  1. Reports → New Report → Purchase Orders
  2. Filter Amount__c >= 500,000
  3. Columns: PO Name, Vendor, Amount, Status, Expected Delivery, Dept
  4. Run → Save as **High-Value POs Report**
- **Expected Results (Sample):** PO-101, PO-106, PO-102, PO-109, PO-105

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4. Active Purchase Orders Report

- **Definition:** POs with Status__c in Submitted, Approved, Draft
- **Steps:**

1. Reports → New Report → Purchase Orders
2. Filter Status__c IN ('Submitted', 'Approved', 'Draft')
3. Columns: PO Name, Vendor, Dept, Amount, Status, Expected Delivery
4. Run → Save as **Active Purchase Orders Report**

Part B — Dashboards (Step-by-Step)

1. Vendor Performance Dashboard

- **Components:**
    - Metric → Vendor Spend Report (SUM Amount__c) → Title: Total Vendor Spend
    - Bar Chart → Vendor Spend Report grouped by Vendor → Top 10 Vendors
    - Table → Top 5 vendors rows (Vendor Name, Rating, Total Spend, Total POs)
    - Gauge/Metric → Number of High-Value POs
- **Steps:**

1. App Launcher → Dashboards → New Dashboard
2. Name: Vendor Performance Dashboard → Folder: Vendor Dashboards
3. Add components → configure as above
4. Arrange layout → Save
5. Schedule refresh: Daily at 07:00

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2. Top 5 Vendors Dashboard

- **Steps:**
    1. Create a report sorted by vendor spend desc
    2. Filter Top 5 vendors (report ranking)
    3. Add horizontal bar chart in dashboard → Vendors vs Spend

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3. High-Value POs Dashboard

- **Components:**
    - Table → Report filtered Amount__c >= 500,000
    - Metric → Count of High-Value POs
    - Pie/Donut → Distribution by Status
- **Expected Results:** PO-101, PO-106, PO-102, PO-109, PO-105

Part C — Security (Step-by-Step)

1. Sharing Model (OWD & Sharing Rules)

- Set **OWD to Private** for Vendor__c & Purchase_Order__c
- Create Role Hierarchy (CEO, Procurement Manager, Officer, Finance Manager, IT Manager)
- Create Sharing Rules (criteria-based), e.g., share Procurement POs to Procurement Officer role

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2. Field-Level Security (FLS)

- Restrict financial/sensitive fields (Tax_Id, Bank details)
- Setup → Object Manager → Vendor__c → Fields → Set FLS → uncheck non-Finance profiles
- Use Permission Sets to grant temporary access

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3. Profiles & Permission Sets

- Procurement Officer: Create/Edit Purchase Orders, Read Vendors
- Manager: Approve POs, Read/Edit Purchase Orders, Read Vendors
- Finance: Access financial fields via Permission Set

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4. Session Security / Login Controls

- Session Timeout: 30 mins
- IP Ranges: Restrict logins per profile
- Login Hours: Restrict if needed
- Monitor via Login History

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5. Audit Trail & Monitoring

- Enable Field History Tracking:
  - Vendor__c → Rating__c, Compliance_Status__c
  - Purchase_Order__c → Status__c, Amount__c
- Setup → Audit Trail → Download last 6 months

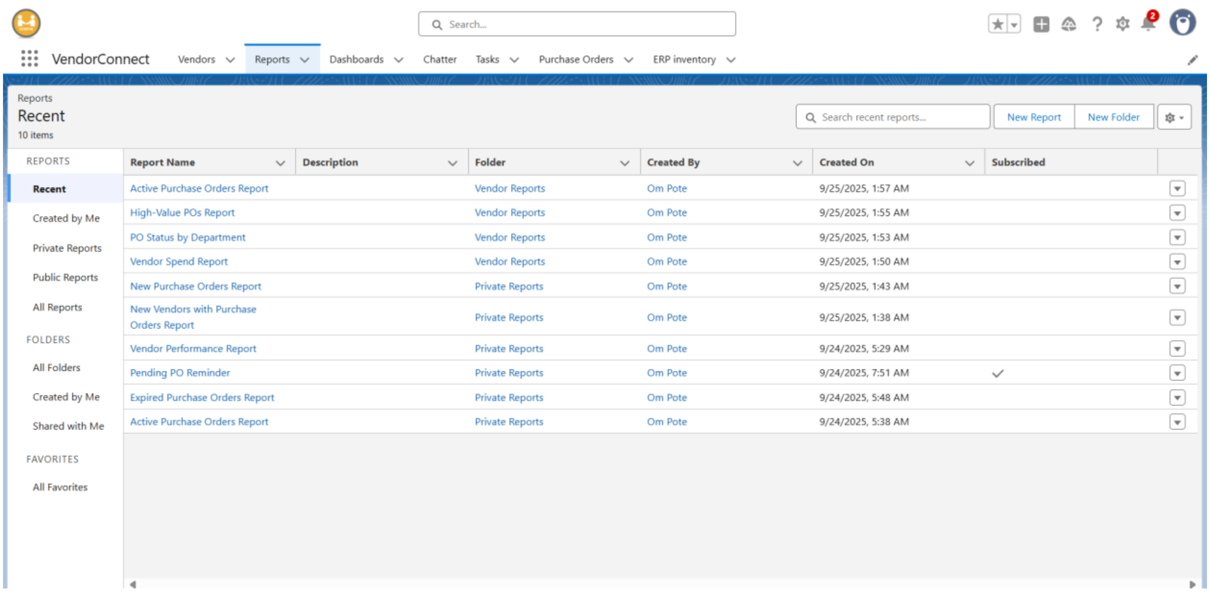
Part D — Testing & Validation

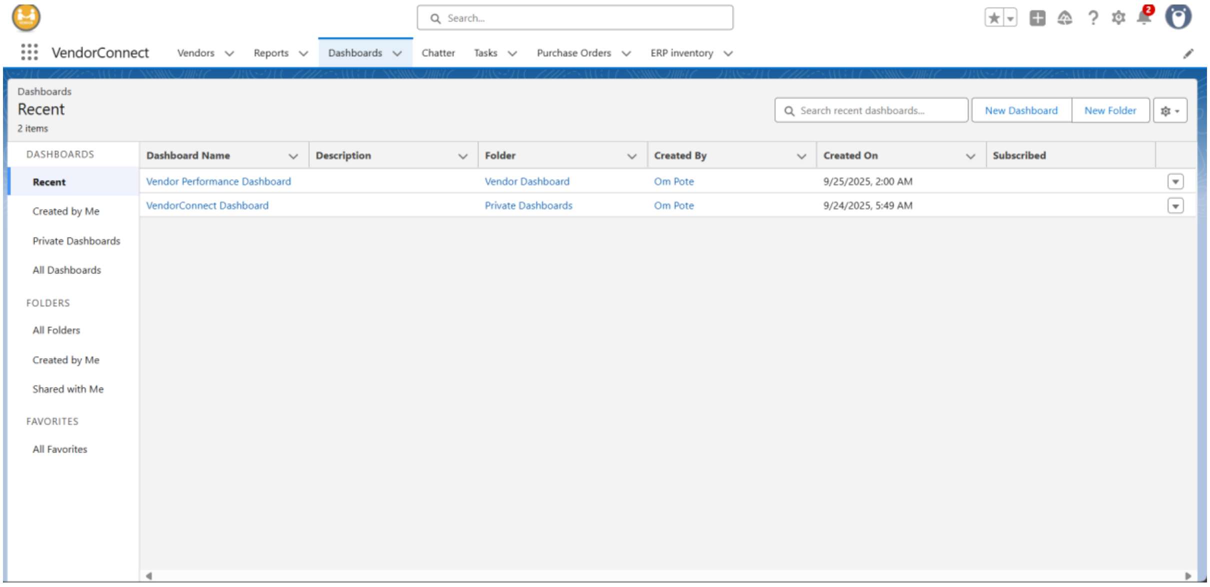
- Run SOQL queries to verify reports
- Spot-check Vendor & PO records
- Test sharing & field-level access using “Login As”
- Validate dashboard totals match reports
- Attempt login from blocked IP → should fail

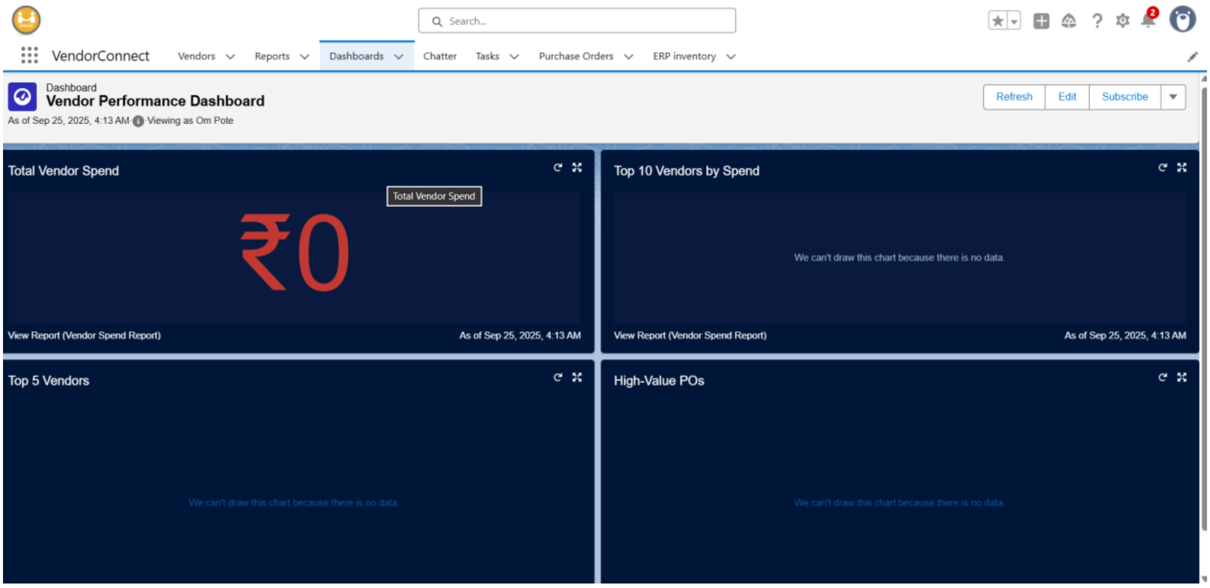
Part E — Deliverables

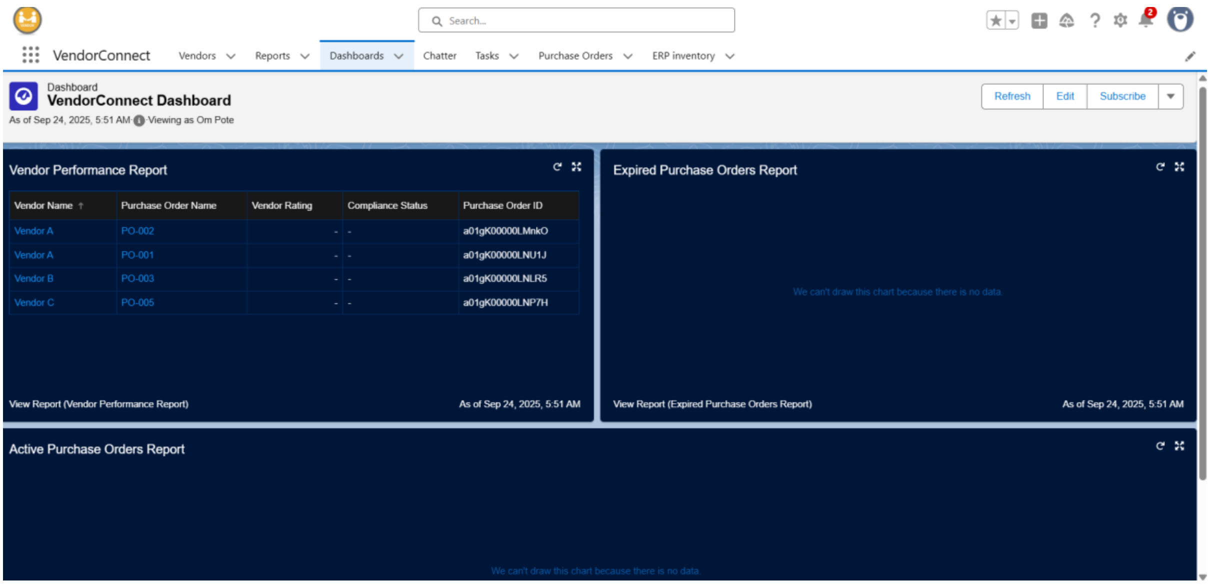
- **Reports:** Vendor Spend, PO Status by Department, High-Value POs, Active POs
- **Dashboards:** Vendor Performance, Top 5 Vendors, High-Value POs
- **Security:** OWD Private, Sharing

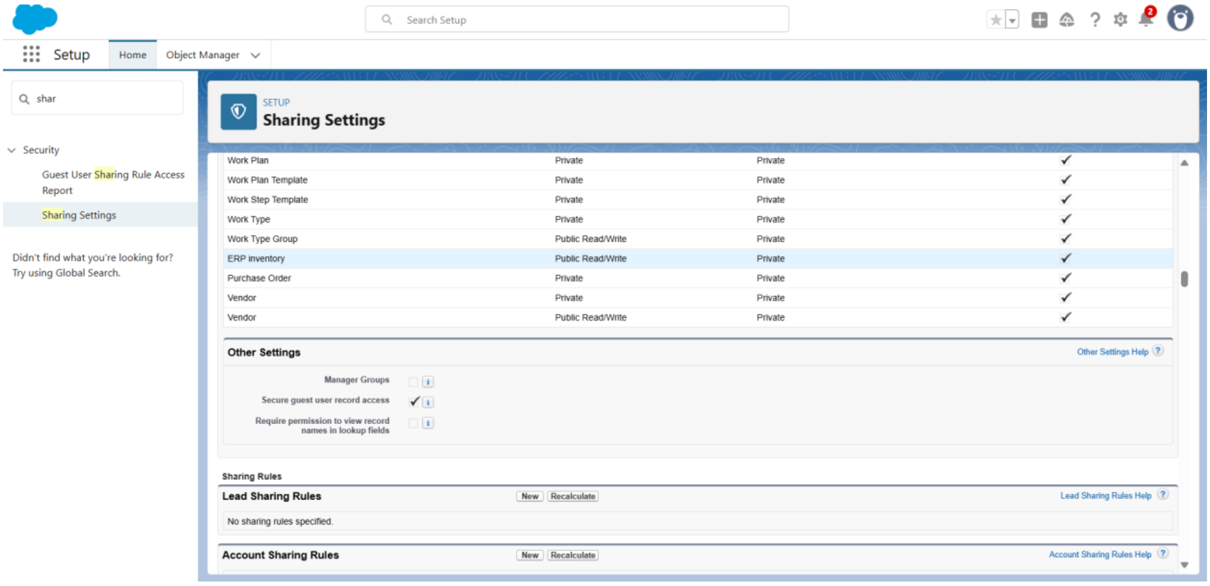
Screenshots:




VendorConnect
Vendors
Reports
Dashboards
Chatter
Tasks
Purchase Orders
ERP inventory
Dashboards
Recent
2 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Vendor Performance Dashboard
Vendor Dashboard
Om Pote
9/25/2025, 2:00 AM
VendorConnect Dashboard
Private Dashboards
Om Pote
9/24/2025, 5:49 AM


VendorConnect
Vendors
Reports
Dashboards
Chatter
Tasks
Purchase Orders
ERP inventory
Dashboard
Vendor Performance Dashboard
As of Sep 25, 2025, 4:13 AM Viewing as Om Pote
Refresh
Edit
Subscribe
Total Vendor Spend
Total Vendor Spend
₹0
View Report (Vendor Spend Report)
As of Sep 25, 2025, 4:13 AM
Top 10 Vendors by Spend
We can't draw this chart because there is no data.
View Report (Vendor Spend Report)
As of Sep 25, 2025, 4:13 AM
Top 5 Vendors
We can't draw this chart because there is no data.
High-Value POs
We can't draw this chart because there is no data.


VendorConnect
Vendors
Reports
Dashboards
Chatter
Tasks
Purchase Orders
ERP inventory
Dashboard
VendorConnect Dashboard
As of Sep 24, 2025, 5:51 AM Viewing as Om Pote
Refresh
Edit
Subscribe
Vendor Performance Report
Vendor Name
Purchase Order Name
Vendor Rating
Compliance Status
Purchase Order ID
Vendor A
PO-002
a01gK00000LMnkO
Vendor A
PO-001
a01gK00000LNU1J
Vendor B
PO-003
a01gK00000LNLR5
Vendor C
PO-005
a01gK00000LNP7H
View Report (Vendor Performance Report)
As of Sep 24, 2025, 5:51 AM
Expired Purchase Orders Report
We can't draw this chart because there is no data.
View Report (Expired Purchase Orders Report)
As of Sep 24, 2025, 5:51 AM
Active Purchase Orders Report
We can't draw this chart because there is no data.


Search Setup
Setup
Home
Object Manager
shar
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Work Plan Private Private
Work Plan Template Private Private
Work Step Template Private Private
Work Type Private Private
Work Type Group Public Read/Write Private
ERP inventory Public Read/Write Private
Purchase Order Private Private
Vendor Private Private
Vendor Public Read/Write Private
Other Settings
Other Settings Help
Manager Groups
Secure guest user record access
Require permission to view record names in lookup fields
Sharing Rules
Lead Sharing Rules
New
Recalculate
Lead Sharing Rules Help
No sharing rules specified.
Account Sharing Rules
New
Recalculate
Account Sharing Rules Help