

PROJECT MANAGEMENT APP

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Phase 9: Reporting, Dashboards & Security Review

Goal: Generate insights and ensure security of project data.

- Create reports for project progress, overdue tasks, and milestones.
- Generate dashboards for managers showing KPIs and resource use.
- Design dynamic dashboards with role-based visibility.
- Define report types linking Projects and Tasks.
- Apply field-level security for sensitive project fields.
- Set login IP ranges and session timeout policies.
- Enable audit trail to monitor admin changes.
- Test data visibility with different profiles and roles.
- Conduct a security review before production release.

The screenshot displays a web application interface for project management. At the top, there's a navigation bar with a search bar and several icons. Below the navigation bar, the main content area is divided into two sections. The left section, titled 'Project', shows details for a project named 'This is my first project'. It includes fields for Project Name, Project Description, Project Type, Fixed Price, Start Date, End Date, Project Status, and Hours. The right section, titled 'Activity', shows a list of activities for the project, including a section for 'Upcoming & Overdue' and a section for 'September 2025'.

Project Management App Interface

Navigation Bar:

- Search: Q Search...
- Icons: Star, Home, Help, Settings, Notifications, Profile

Project Management Section:

- Project: This is my first project
- Buttons: New Contact, Edit, New Opportunity

Project Details:

Related	Details
Project Name	This is my first project
Account Name	KULDEEP UPADHAY
Project Description	This is the description
opportunity	KULDEEP
Details	
Project Type	Fixed Price
Project Status	Ongoing
Start Date	9/25/2025
End Date	1/1/2026
Hours	
Total Hours	80.00
Hours Worked To Date	45.00
Remaining Hours	35.00

Activity Section:

- Filters: All time • All activities • All types
- Buttons: Refresh, Expand All, View All
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- September 2025:** [No subject] You had an event 6:00 AM | Sep 25
- No more past activities to load.

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

All Folders

7 items

Q Search all folders...

New Report

New Folder

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REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Spring '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Summer '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Summer '22	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Einstein Bot Reports Winter '23	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Enablement Dashboard Reports Spring '24	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM
Enablement Dashboard Reports Summer '24	Automated Process	7/17/2025, 1:32 PM	Automated Process	7/17/2025, 1:32 PM

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

Public Reports

7 items

Q Search public reports...

New Report

New Folder

⚙️

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Project Management

Projects

Timesheets

Reports

Q Search...

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Reports

All Reports

31 items

Q Search all reports...

New Report

New Folder

⚙️

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites