Phase 9: Reporting, Dashboards & Security Review

Reports and Dashboards

Our data model is now populated and our automations are running. We need to create visual tools that allow our users—from Mentors to the Dean—to understand what the data is telling them. We will build a series of reports and combine them into a powerful "Student Success Dashboard."

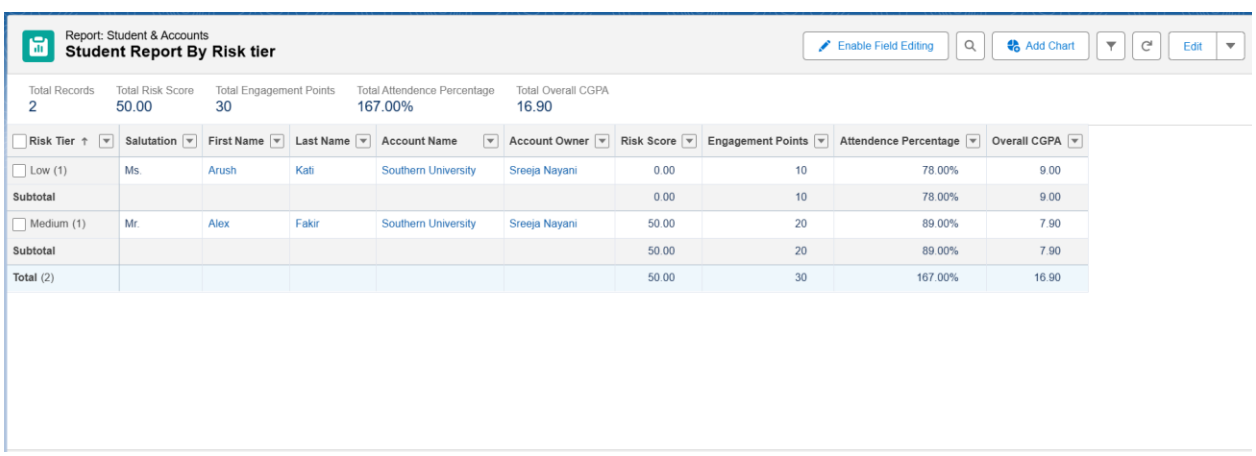
Step 1: Build the "Source" Reports

A dashboard is only as good as the reports that feed it. Let's create three key reports.

Go to the **Reports** tab and click **New Report** for each of the following. Remember to save them in the **"Public Reports"** folder.

Report 1: "Student Report By Risk Tier "

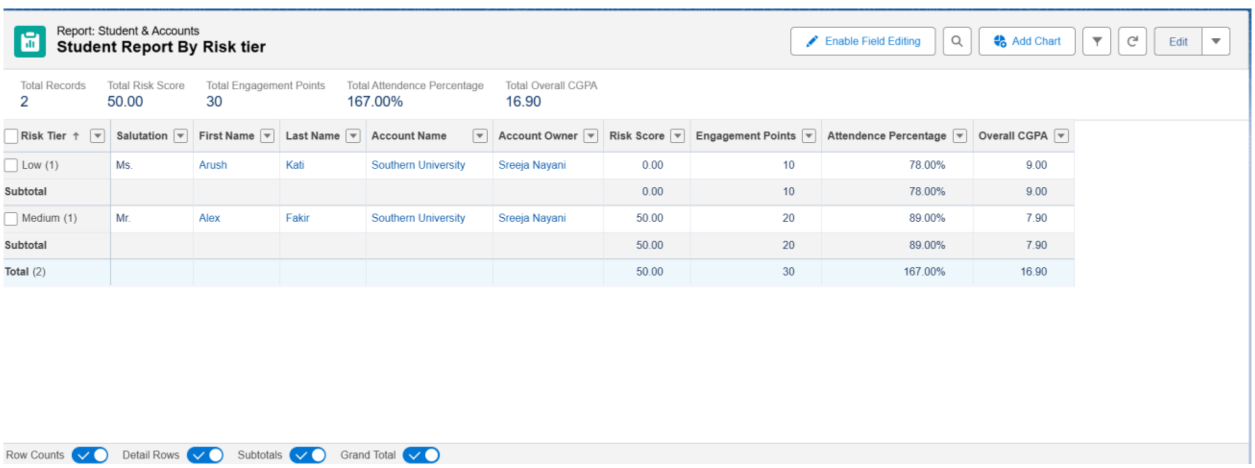
- **Report Type:** Contacts & Accounts
- **Goal:** To see how many students fall into each risk category.
- **Configuration:**
  - **Group Rows:** Group the report by your **Risk Tier** formula field.
  - **Columns:** Add useful columns like Full Name, Overall CGPA, Current Backlogs, and Student Owner.
  - **Filters:** Ensure the standard filters are set to "All Time."
- **Save As:** Student Report By Risk Tier



Risk Tier	Salutation	First Name	Last Name	Account Name	Account Owner	Risk Score	Engagement Points	Attendence Percentage	Overall CGPA
Low (1)	Ms.	Arush	Kati	Southern University	Sreeja Nayani	0.00	10	78.00%	9.00
Subtotal						0.00	10	78.00%	9.00
Medium (1)	Mr.	Alex	Fakir	Southern University	Sreeja Nayani	50.00	20	89.00%	7.90
Subtotal						50.00	20	89.00%	7.90
Total (2)						50.00	30	167.00%	16.90

Report 2: "Support Interaction Volume"

- **Report Type:** Create a **New Custom Report Type** first.
  - **Primary Object:** Support Interactions
  - Store in Category: "Student Support Reports"
  - Save and make "Deployed."
- **Goal:** To understand which support services are being used the most.
- **Configuration:**
  - Use your new "Support Interactions" report type.
  - **Group Rows:** Group the report by the **Type** field (or Support_Type__c for academic interactions).
  - **Columns:** Add columns like Student, Interaction Date.
- **Save As:** Support Interaction Volume


Report: Student & Accounts
Student Report By Risk tier

Enable Field Editing | Add Chart | Edit

Total Records	Total Risk Score	Total Engagement Points	Total Attendence Percentage	Total Overall CGPA
2	50.00	30	167.00%	16.90

Risk Tier ↑	Salutation	First Name	Last Name	Account Name	Account Owner	Risk Score	Engagement Points	Attendence Percentage	Overall CGPA
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Total (2)						50.00	30	167.00%	16.90

Row Counts | Detail Rows | Subtotals | Grand Total

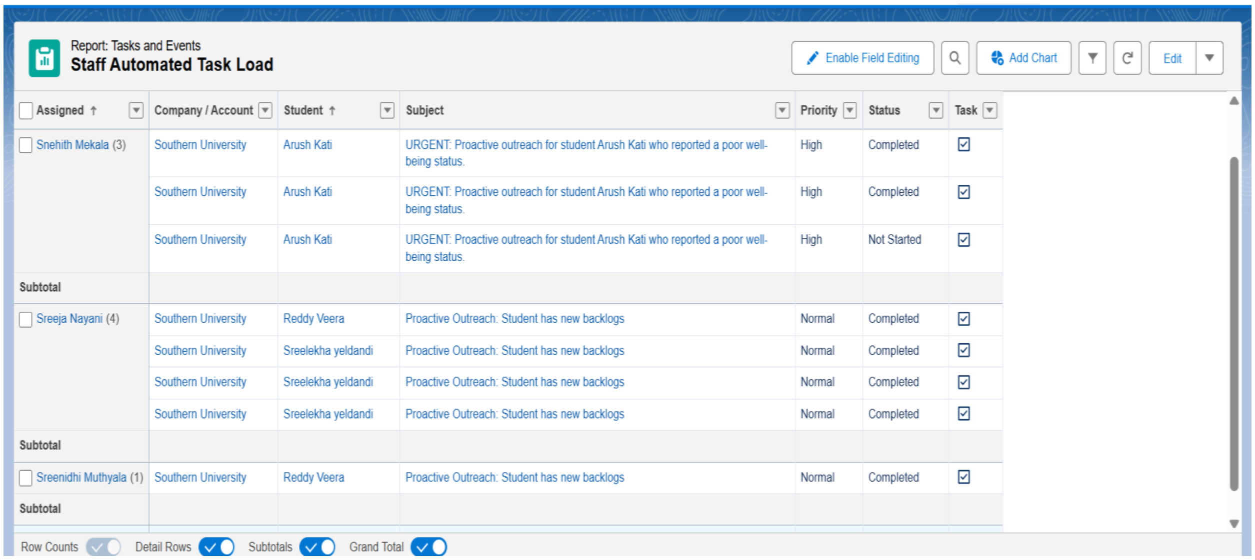
Report 3: "Staff Workload & Engagement"

- **Report Type:** Activities (Tasks & Events)
- **Goal:** To see which staff are being assigned the most tasks from our automations.
- **Configuration:**
  - **Filters:**
    - Change "Show Me" to All Activities and Open & Completed Activities.
    - Change the Date filter to a wider range like "Current FY."

- Add a filter for Subject **contains** "Proactive" OR Subject **contains** "URGENT". This will show only the tasks created by our flows.

  - **Group Rows:** Group the report by **Assigned** (the task owner).
  - **Columns:** Add columns like Subject, Due Date, and Related To (which will show the student's name).

- **Save As:** Staff Automated Task Load



Report: Tasks and Events
Staff Automated Task Load

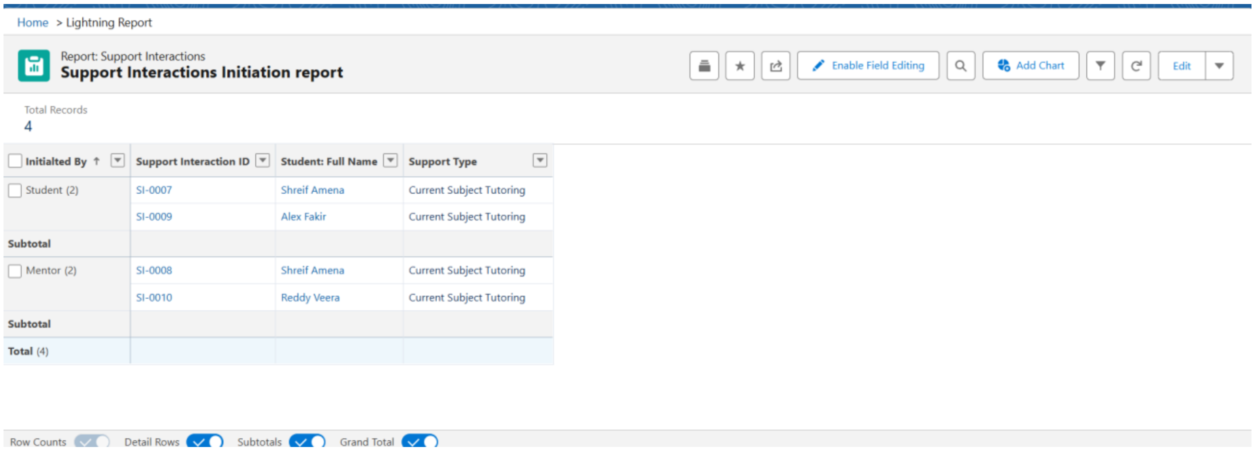
Enable Field Editing | Add Chart | Edit

Assigned ↑	Company / Account	Student ↑	Subject	Priority	Status	Task
Snehith Mekala (3)	Southern University	Arush Kati	URGENT: Proactive outreach for student Arush Kati who reported a poor well-being status.	High	Completed	☑
	Southern University	Arush Kati	URGENT: Proactive outreach for student Arush Kati who reported a poor well-being status.	High	Completed	☑
	Southern University	Arush Kati	URGENT: Proactive outreach for student Arush Kati who reported a poor well-being status.	High	Not Started	☑
Subtotal						
Sreeja Nayani (4)	Southern University	Reddy Veera	Proactive Outreach: Student has new backlogs	Normal	Completed	☑
	Southern University	Sreelekha yeldandi	Proactive Outreach: Student has new backlogs	Normal	Completed	☑
	Southern University	Sreelekha yeldandi	Proactive Outreach: Student has new backlogs	Normal	Completed	☑
	Southern University	Sreelekha yeldandi	Proactive Outreach: Student has new backlogs	Normal	Completed	☑
Subtotal						
Sreenidhi Muthyala (1)	Southern University	Reddy Veera	Proactive Outreach: Student has new backlogs	Normal	Completed	☑
Subtotal						

Row Counts | Detail Rows | Subtotals | Grand Total

Report 4: "Support Interaction Initiation"

- **Report Type:** Support Interactions (your custom report type)
- **Goal:** To analyze who is initiating support engagements—students or Mentors.
- **Configuration:**
  - **Group Rows:** Grouped by the **Initiated By** field.
  - **Columns:** Student, Interaction Date, Type, Student Owner.
- **Saved As:** Support Interaction Initiation Report (in a Public Folder).

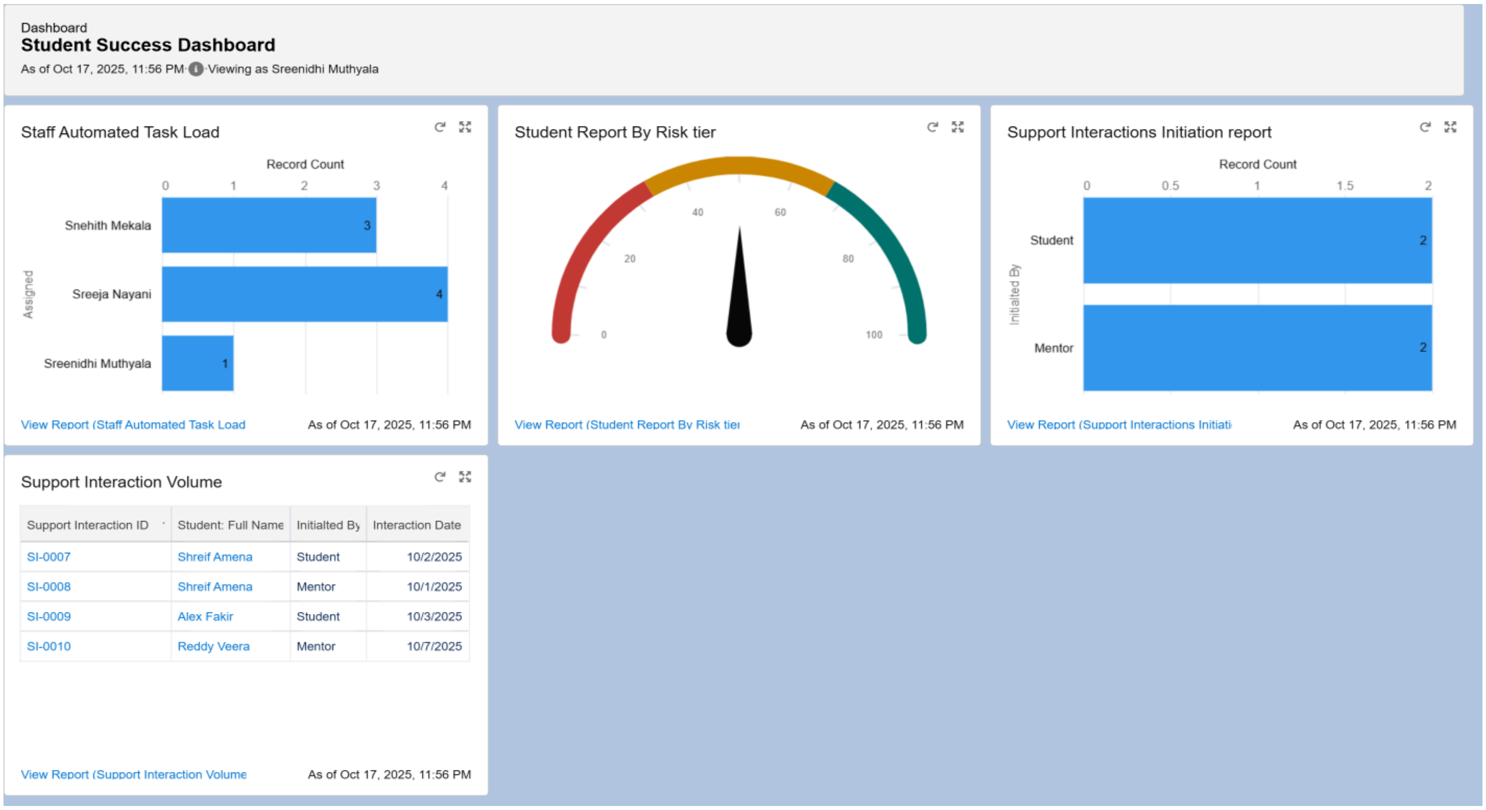


Step 2: Build the Dashboard

Now we'll assemble these reports into a single, visual dashboard.

1. Go to the **Dashboards** tab and click **New Dashboard**.
2. **Name:** Student Success Dashboard
3. Click **Create**.
4. You are now in the dashboard editor. Click **+ Component** to add your first chart.
   - **Component 1: The Risk Donut Chart**
     - **Report:** Select Student Risk Tier Breakdown.
     - **Display As:** Choose the **Donut Chart**.
     - **Value:** Record Count.
     - **Purpose:** Provides an immediate, at-a-glance view of the overall risk distribution of the student population. It allows the Dean and Mentors to quickly see the percentage of students in "High," "Medium," and "Low" risk categories, helping to prioritize outreach efforts.
     - Click **Add**.
   - **Component 2: The Support Interaction Bar Chart**
     - Click **+ Component**.
     - **Report:** Select Support Interaction Volume.
     - **Display As:** Choose the **Vertical Bar Chart**.

        - **Purpose:** Shows which support services are being utilized the most. This helps university leadership understand resource allocation and identify which services are most in-demand (e.g., "Backlog Guidance" vs. "Tutoring").
        - Click **Add**.
    - **Component 3: The Mentor Leaderboard**
        - Click **+ Component**.
        - **Report:** Select Mentor Automated Task Load.
        - **Display As:** Choose the **Table (Lightning Table)**. This will show a simple list of Mentors and their total number of assigned tasks.
        - **Purpose:** Acts as a workload and engagement leaderboard. It displays a simple list of Mentors and the total count of proactive tasks assigned to them by the system's automations. This helps management understand who is receiving the most alerts and how the system is distributing work.
        - Click **Add**.
    - **Component 4: Interaction Initiated By**
        - Click + Component.
        - **Report**: Select your new report, Support Interaction Initiation Report.
        - **Display As**: Choose the Vertical Bar Chart. This will show two distinct bars, one for "Student" and one for "Mentor," making it easy to visually compare the counts.
        - **Purpose:** This component answers the critical business question: "Are students seeking help, or are Mentors driving the engagement?" By comparing the number of interactions initiated by "Student" versus "Mentor," it provides a powerful metric for student proactivity and the effectiveness of the support ecosystem.
        - Click **Add.**



Security Review

The Goal is to perform a final, comprehensive audit of our security settings to ensure that the right people have the right level of access to the right data.

Your Action: Use the following as a checklist to review your configuration.

1. Sharing Settings (OWD):

- **Go to:** Setup -> Sharing Settings.
- **What to Check:**
  - Confirm that the Organization-Wide Default (OWD) for the **Contact** (Student) object is set to **Private**. This is our baseline, ensuring no one can see a student record they don't own by default.
  - Confirm the OWD for your custom objects (Success Plan, Support Interaction) is also set to **Private** or **Controlled by Parent**.

2. Sharing Rule:

- **Go to:** Setup -> Sharing Settings -> Contact Sharing Rules.
- **What to Check:**

- Confirm your **"Share Student with Designated Counselor"** rule is active.
- Verify its criteria (e.g., Designated Counselor is not blank).
- Verify it's being shared with the **Counseling Staff Role** with **Read-Only** access. This is the rule that allows counselors to see the records of students they are assigned to.

3. Field-Level Security (FLS):

- **Go to:** Setup -> Profiles.
- **What to Check:**
  - **The Counselor Profile:** Click on the Counseling Staff profile. Go to **Object Settings -> Support Interaction**. Verify that they have **Read/Edit** access to Well_Being_Session_Notes__c, but that other fields might be Read-Only. Verify they **do not** have access to "Academic Support" record types.
  - **The Advisor Profile:** Click on the Student Advisor profile. Check its permissions. Can it create and edit Success Plans? Can it see the Risk Tier field?
  - **The Student Permission Set:** Review your **Student Access Permission Set**. Does it correctly grant Read-Only access to most fields, but Edit access where needed (like Proficiency Level on Student Skill)? Crucially, does it **hide** sensitive internal fields like Advisor Alert Notes?

4. Audit Trail:

- **Go to:** Setup -> View Setup Audit Trail.
- **What to Check:** This is the ultimate log of all administrative changes made to the org. You can use it to see who created which fields, who changed the sharing settings, and who modified profiles. It's the final source of truth for your security review, proving that the settings are configured as intended.