

Legal Aid Connect CRM- Phase 9: Reporting, Dashboards & Security Review (Admin) Report

Project Title: LegalAid Connect – Legal Aid CRM
Phase: 9 - Reporting, Dashboards & Security Review
Date: 30 September 2025
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1. Introduction

Phase 9 was critical for transforming the operational data within Legal Aid Connect into **actionable insights** for case workers, supervisors, and management. This involved developing key reports and a centralised dashboard. Concurrently, a comprehensive **security review** was executed to ensure the sensitive nature of client and case information is protected, strictly adhering to **client confidentiality** and the principle of least privilege..

2. Reports & Analytics

Purpose: To design reports and dashboards that allow stakeholders to monitor legal case progress, analyze client service trends, and evaluate advocate performance while maintaining data confidentiality.

Component	Implementation Details
Custom Reports	Several operational reports were created: <ul style="list-style-type: none">• <i>Case Intake Summary Report</i> – grouped cases by Case Type (Criminal, Civil, Family) and Status (Open, In Progress, Closed).• <i>Advocate Performance Report</i> – Matrix report analyzing cases handled by each advocate against case outcomes.• <i>Client Service Report</i> – Summary report to track the number of services provided per client, segmented by service category.
Custom Report Types	Custom Report Types were built for the Legal Case , Client , and Service Provided objects. These templates ensure that case-specific and client-specific reports can be generated with precision.
Dashboards	A Legal Aid Officer Dashboard was created to provide at-a-glance visibility of: <ul style="list-style-type: none">• Active cases assigned per advocate• Case resolution rate• Client intake trends by month. Configured as a Dynamic Dashboard so each advocate or officer only sees data relevant to their role, improving usability and security.

1. Custom Reports:

Report: Cases
New Cases Report

Enable Field Editing

Q

Add Chart

▼

↺

Edit

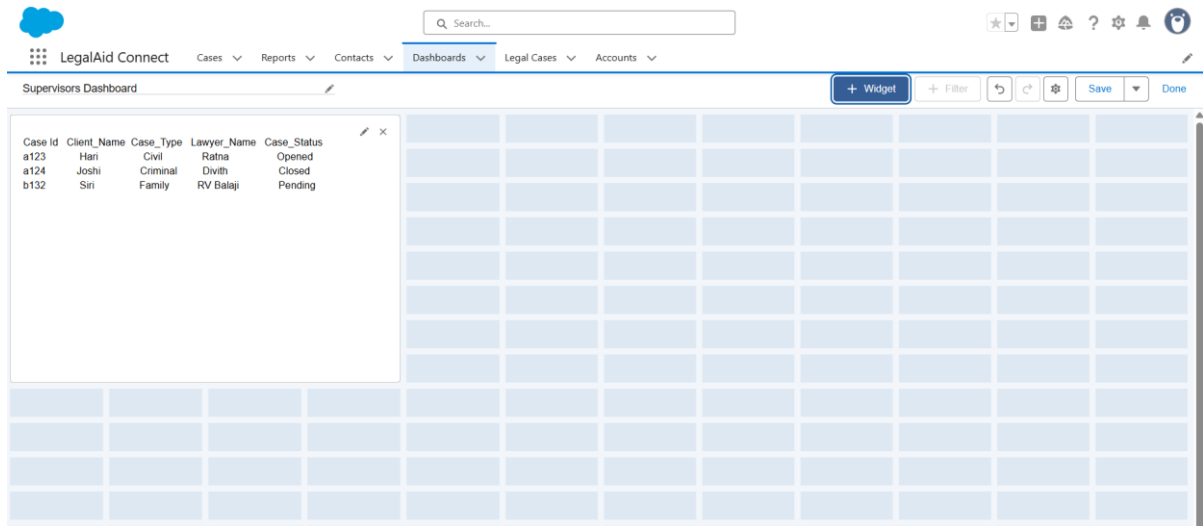
▼

Total Records
26

<input type="checkbox"/> Case Owner	<input type="text"/> Case Number	<input type="text"/> Case Record Type	<input type="text"/> Account Name	<input type="text"/> Subject	<input type="text"/> Date/Time Opened	<input type="text"/> Age	<input type="text"/> Open	<input type="text"/> Closed
<input type="checkbox"/> Org/Firm EPIC (26)	00001000 (1)	- (1)	Edge Communications	Starting generator after electrical failure	9/19/2025, 9:02 AM	-9,969	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Subtotal							
	00001001 (1)	- (1)	United Oil & Gas Corp.	Performance inadequate for second consecutive week	9/19/2025, 9:02 AM	-9,969	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Subtotal							
	00001002 (1)	- (1)	United Oil & Gas Corp.	Seeking guidance on electrical wiring installation for GC5090	9/19/2025, 9:02 AM	301	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Subtotal							
	00001003 (1)	- (1)	Express Logistics and Transport	Easy installation process	9/19/2025, 9:02 AM	-9,969	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Subtotal							
	00001004 (1)	- (1)	Express Logistics and Transport	Maintenance guidelines for generator unclear	9/19/2025, 9:02 AM	-9,969	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Subtotal							
	00001005 (1)	- (1)	Express Logistics and Transport	Electrical circuit malfunctioning	9/19/2025, 9:02 AM	-9,969	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Subtotal							

Row Counts ☐ Detail Rows ☒ Subtotals ☒ Grand Total ☒

2. Dashboards



3. Security & Access Review

Purpose: To ensure the confidentiality of client and case records, adhering to the principle of least privilege.

Security Area	Actions Taken
Sharing Model Verification	Organization-Wide Defaults (OWD) were set to: <ul style="list-style-type: none">• Private for Legal Case and Client records (ensuring confidentiality).• Controlled by Parent for related objects like Service Provided.
Field-Level Security (FLS) Audit	Profiles such as <i>Advocate</i> , <i>Paralegal</i> , and <i>External Partner</i> were audited to ensure only authorized fields are visible. Sensitive fields like <i>Client Personal Information</i> and <i>Case Notes</i> were hidden from non-admin roles.
System Access Policies	Session settings were strengthened with shorter timeout values. Login IP Ranges were configured for Admins to restrict access from trusted networks only. Two-Factor Authentication (2FA) enforced for users with access to sensitive data.

1. Sharing Model Verification:

SETUP

Sharing Settings

Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case Assignment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case Ledger	Public Read/Write	Private	<input checked="" type="checkbox"/>
Client	Private	Private	<input checked="" type="checkbox"/>
Client Profile	Public Read/Write	Private	<input checked="" type="checkbox"/>
Court Order	Public Read/Write	Private	<input checked="" type="checkbox"/>
Hearing	Public Read/Write	Private	<input checked="" type="checkbox"/>
Lawyer Profile	Public Read/Write	Private	<input checked="" type="checkbox"/>
Legal Case	Private	Private	<input checked="" type="checkbox"/>
Service Provided	Private	Private	<input checked="" type="checkbox"/>
Urgent Review	Public Read/Write	Private	<input checked="" type="checkbox"/>

User Visibility Settings

Portal User Visibility ☐ ⓘ Site User Visibility ☐ ⓘ

Other Settings

Standard Report Visibility ☒ ⓘ Manual User Record Sharing ☐ ⓘ Manager Groups ☐ ⓘ

Minimize the number of roles created, which improves performance by cutting down processing loads ☒ ⓘ

Grant site users access to related cases ☒ ⓘ

Secure guest user record access ☒ ⓘ

Require permission to view record names in lookup fields ☐ ⓘ

Save

Cancel

2. Field-Level Security (FLS) Audit:

SETUP

Set Field-Level Security

Case Notes

Save Cancel

Field Label	Case Notes
Data Type	Picklist

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input type="checkbox"/>	<input type="checkbox"/>

3. System Access Policies:

SETUP

Session Settings

Session Settings

Help for this Page

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value

4 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated

☒ Lock sessions to the domain in which they were first used

☐ Terminate all of a user's sessions when an admin resets that user's password

☒ Force relogin after Login-As-User

☐ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

☐ Enforce login IP ranges on every request

☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

☒ Enable caching and autocomplete on login page

☒ Enable secure and persistent browser caching to improve performance

☒ Enable user switching

4. Phase 9 Outcome

- LegalAid Connect now provides **role-specific analytics** that empower legal staff to monitor and improve client service.
- A robust **security framework** ensures compliance with confidentiality standards and protects sensitive legal data.
- The CRM is **feature-complete, secure, and ready for the final presentation and demonstration.**