

AgriTrust Connect- Phase 9: Reporting, Dashboards & Security Review (Admin) Report

Project Title: AgriTrust Connect - Sustainable Agriculture CRM

Phase: 9 - Reporting, Dashboards & Security Review

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1. Introduction


Phase 9 focused on translating the application's raw data into actionable insights for key stakeholders. This was achieved by building a suite of custom reports and an interactive dashboard. This phase also included a comprehensive security review to harden the application, ensuring that data is not only visible and useful but also well-protected according to the principle of least privilege.

2. Reports & Analytics

Purpose: To create visualizations and data summaries that support business decision-making for various user roles.

Component	Implementation Details
Custom Reports	Several key operational reports were built to analyze core business metrics. This included a Summary Report to group Crop Cycles by Season (Kharif vs. Rabi) and a Matrix Report to analyze Procurements by both Buyer and Crop type.
Custom Report Types	Custom Report Types were created for the Crop Cycle and Procurement objects. These custom types serve as the essential templates for building any report that requires data from these specific objects.
Dashboards	An Extension Officer Dashboard was created to provide at-a-glance visualizations of key metrics. It was configured as a Dynamic Dashboard , allowing it to display data specific to the viewing user (e.g., showing only the farmers they manage), thus personalizing the experience and reducing the need for multiple dashboards.

1. Custom Reports:



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AgriTrust Connect

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Farms

Crop Cycles

Advisories

Procurements

Reports

Traceability Ledgers

Dashboards

Report: Crop Cycles

Crop Cycles by Season

Enable Field Editing

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Add Chart

▼

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Edit

▼

Total Records
3

	Crop Cycle Name	Season
1	RABI-ZAID	rabi
2	Zaid cycle	zaid
3	Kharif	kharif

To Do List

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Dashboards

Report: Procurements

Procurements by Buyer and Crop

Enable Field Editing

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📊 Add Chart

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Edit

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Total Records

2

	Procurement Name	Buyer: Account Name	Buyer Account Name	Related Crop Cycle: Crop Cycle Name
1	ATP - Paddy	SVB	SVB	Kharif
2	Kurnool Traders - Rice - Sep 2025	Kurnool Traders	Kurnool Traders	RABI-ZAID

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2. Dashboards

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Dashboards

Extension Officer Dashboard

+ Widget

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Save

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Done

Crop Cycles by Season

Crop Cycle Name	Season
Kharif	kharif
RABI-ZAID	rabi
Zaid cycle	zaid

View Report (Crop Cycles by Season)

Procurements by Buyer and Crop

Procurement Name	Buyer: Ac...	Buyer Acc...	Related Crop Cycle: Crop ...
ATP - Paddy	SVB	SVB	Kharif
Kurnool Traders - Rice - Sep 2025	Kurnool Traders	Kurnool Traders	RABI-ZAID

View Report (Procurements by Buyer and Crop)

To Do List

Recent Items

3. Security & Access Review

Purpose: To verify and strengthen the application's security posture before the final presentation.

Security Area	Actions Taken
Sharing Model Verification	A thorough review of the org's sharing model was conducted. Organization-Wide Defaults (OWD) were confirmed to be Private for Contact (Farmer) and Controlled by Parent for Crop Cycle to ensure a secure baseline for record visibility.
Field-Level Security (FLS) Audit	Field-Level Security was audited for key user profiles, such as the Buyer profile, to ensure that sensitive or internal-only fields on objects like Procurement were not visible or editable.
System Access Policies	System access policies were hardened by reviewing Session Settings , including session timeout values. Login IP Ranges for the System Administrator profile were also configured to restrict access to trusted networks.

1. Sharing Model Verification:

Organization-Wide Sharing Defaults Edit

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Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>

2. Field-Level Security (FLS) Audit:

Procurement Field-Level Security for profile

Buyer Profile

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Field Name	Field Type	Read Access	Edit Access
Buyer	Lookup	<input type="checkbox"/>	<input type="checkbox"/>
Buyer Account Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Price per Unit	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Procurement Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quantity in Quintals	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Record Type	Record Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Related Crop Cycle	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. System Access Policies:

Session Settings

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

Session Timeout

Timeout Value

- ☐ 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

4. Phase 9 Outcome

- The application is now equipped with powerful, role-specific analytics to drive informed decision-making for all users.
- The security posture of the application has been verified and strengthened across the data, user, and system levels.
- AgriTrust Connect is now feature-complete, secure, and ready for the final presentation and project demonstration.