

Phase 9: Reports, Dashboards, and Security Review

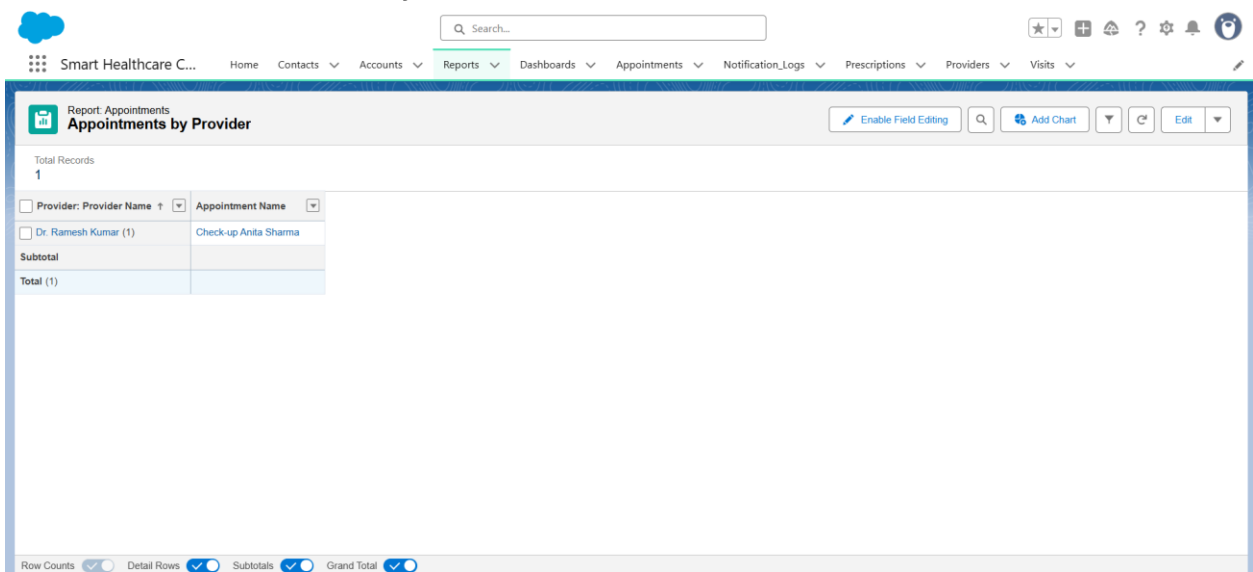
Overview

Phase 9 focuses on creating insightful **reports and dashboards** for the Smart Healthcare Portal and performing a **security review** to ensure data protection and proper access control.

Key Tasks and Enhancements

1. Reports Creation

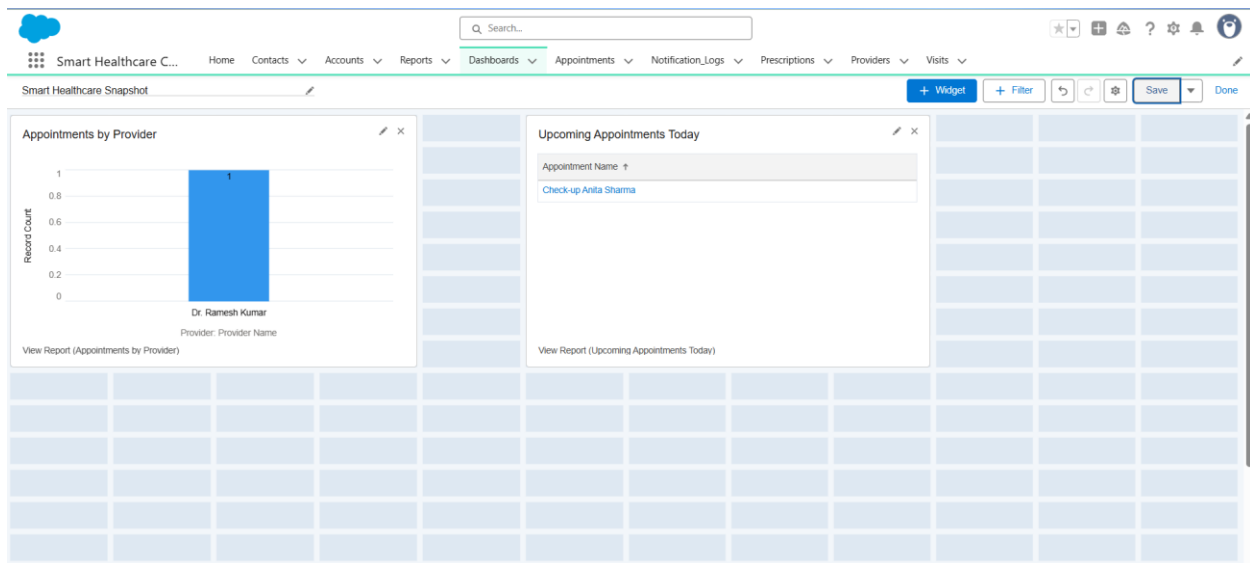
- Designed custom reports for Patients, Appointments, and Providers.
- Reports include metrics like:
 - Number of appointments per day/week/month
 - Patient demographics
 - Provider activity



2.

Dashboards Design

- Built interactive dashboards to visualize report data.
- Dashboards include charts, tables, and key performance indicators (KPIs).
- Added filters for dynamic data analysis (e.g., date range, provider).



3. Security Review

- Reviewed **Profiles and Permission Sets** to ensure proper access control.
- Verified object-level, field-level, and record-level security.
- Ensured external API callouts comply with **Remote Site Settings**.
- Tested login and access for different user roles.

The screenshot shows a patient appointment form. At the top, there's a date and time selector set to '9/26/2025' and '12:30 PM'. Below this, the form has fields for 'Patient' (Abhishek Sharma) and 'Provider' (Dr. Srujana). There are also dropdown menus for 'Status' (set to '--None--') and 'Source' (set to '--None--'). Below these are fields for 'Reason_for_Visit', 'Reminder_Sent' (a checkbox), and 'Appointment Id'. A red error message box is overlaid on the form, stating 'We hit a snag.' and 'Review the errors on this page.' The error message lists: 'AppointmentTrigger: execution of BeforeInsert caused by: System.NullPointerException: Attempt to de-reference a null object Trigger.AppointmentTrigger: line 22, column 1'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

The screenshot displays the Salesforce Setup interface. At the top, there is a navigation bar with a search bar labeled "Search Setup" and several utility icons. Below this, a sidebar menu lists various setup options, with "Remote Site Settings" highlighted. The main content area is titled "Remote Site Settings" and contains a section for "Remote Site Details". This section includes a table with the following information:

| Remote Site Detail | | Edit | Delete | Clone |
|---------------------------|--|--|--------|-------|
| Remote Site Name | HealthCareAPI | Modified By Srujana Balam , 9/25/2025, 2:10 AM | | |
| Remote Site URL | http://hapi.fhir.org | | | |
| Disable Protocol Security | <input type="checkbox"/> | | | |
| Description | HAPI FHIR public test server (R4) | | | |
| Active | <input checked="" type="checkbox"/> | | | |
| Created By | Srujana Balam , 9/25/2025, 2:10 AM | | | |

At the bottom of the details section, there are buttons for "Edit", "Delete", and "Clone".

Tools & Technologies Used

- Salesforce Reports & Dashboards – Visualization and analytics
- Profiles & Permission Sets – Security configuration
- Remote Site Settings – Secure API access
- Lightning App Builder – Dashboard placement and layout