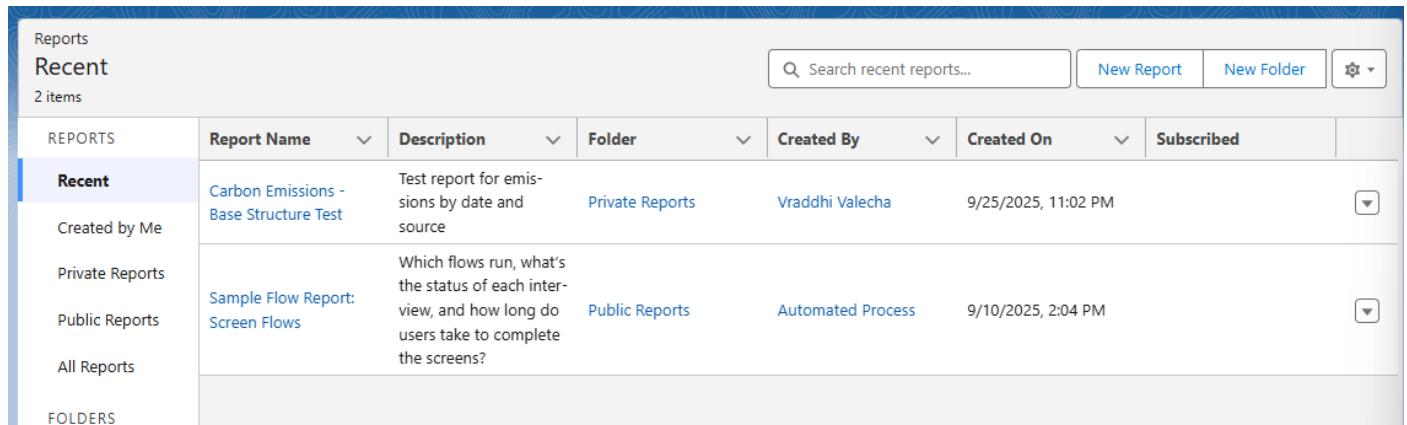


# Carbon Footprint Tracker

## Phase 9: Reporting, Dashboards & Security Review

### 1. Reports (Tabular, Summary, Matrix, Joined)

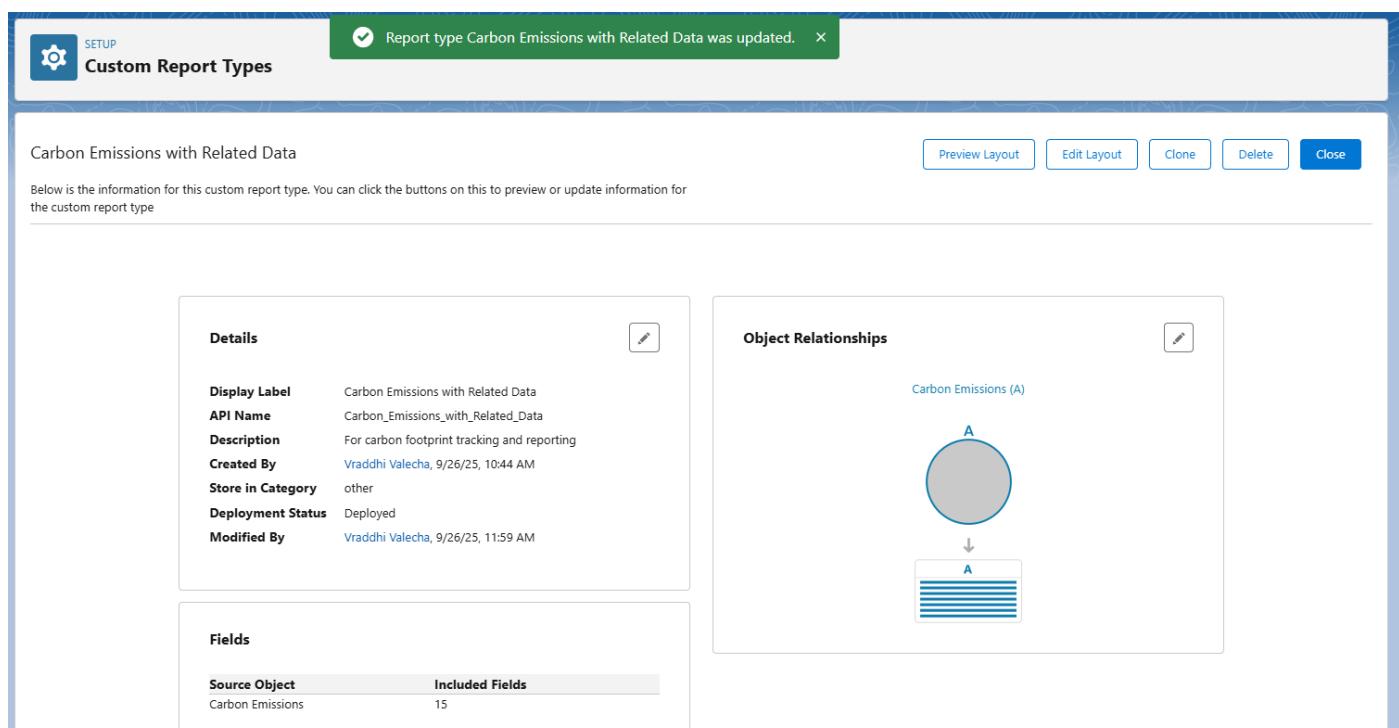
- Created tabular reports for emission records (quick data listings).
- Designed summary reports grouped by emission source and month.
- Built matrix reports to analyse emissions by **scope (1/2/3)** and **region**.
- Implemented joined reports combining **emission data** with **vehicle usage**.



The screenshot shows a reporting interface with a sidebar on the left containing links for Reports, Recent, and 2 items. The main area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table has sections for RECENT, CREATED BY ME, PRIVATE REPORTS, PUBLIC REPORTS, and ALL REPORTS. The FOLDERS section is currently empty. The first report listed is 'Carbon Emissions - Base Structure Test' created by Vraddhi Valecha on 9/25/2025 at 11:02 PM. The second report is 'Sample Flow Report: Screen Flows' created by an Automated Process on 9/10/2025 at 2:04 PM.

### 2. Report Types

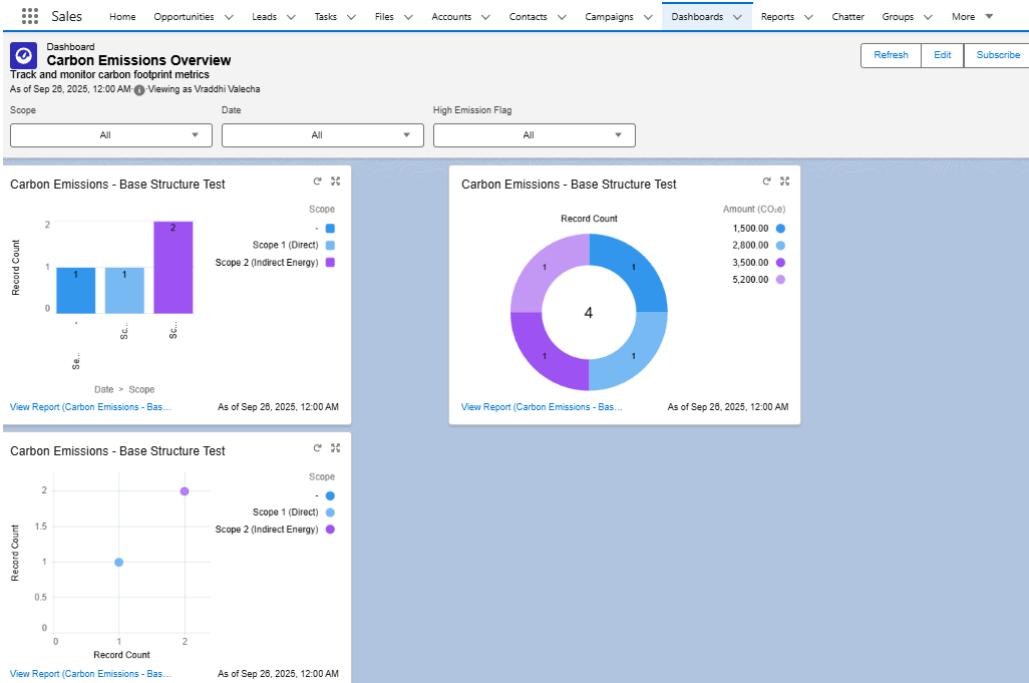
- Custom report type: *Carbon Emissions with Emission Sources*.
- Exposed key fields (Emission Name, Date, Scope, CO<sub>2</sub>e Amount).
- Enabled end-users to build flexible, ad-hoc reports.



The screenshot shows the 'Custom Report Types' setup screen for 'Carbon Emissions with Related Data'. A green success message at the top right states 'Report type Carbon Emissions with Related Data was updated.' The main area contains tabs for 'Details' and 'Object Relationships'. The 'Details' tab shows information like Display Label, API Name, Description, and Deployment Status. The 'Object Relationships' tab displays a diagram where 'Carbon Emissions (A)' is connected to another object (also labeled 'A') via a downward arrow. The 'Fields' tab lists the 'Source Object' as 'Carbon Emissions' and 'Included Fields' as 15.

### 3. Dashboards

- Carbon Footprint Dashboard with multiple components.
- Key metrics: total emissions, high-flagged sources, monthly trend.
- Drill-down capabilities linked directly to source reports.



### 3. Dynamic Dashboards

- Configured dynamic dashboards for role-based visibility.
- Business leaders see org-wide totals.
- Department heads restricted to their own scope emissions.

### 4. Sharing Settings

- Organization-wide defaults (OWD) set to **Private** for Carbon Emissions.
- Sharing rules configured for sustainability team access.

- Role hierarchy ensures leadership visibility.

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"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	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"/>

## 5. Field-Level Security (FLS)

- Restricted *High Emission Flag* to managers only.
- Made *Emission Amount (CO<sub>2</sub>e)* read-only for standard users.
- Enforced compliance through profile and permission set adjustments.

Field-Level Security for Profile	Visible	Read-Only
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"/>
Carbon_Tracker_User	<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"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 6. Session Settings

- Session timeout set to 2 hours for security.
- Forced re-login after inactivity.
- Clickjack protection enabled.

## 7. Login IP Ranges

- Configured trusted IP ranges for corporate office.
- Blocked unrecognized IPs outside allowed ranges.

- Improved security posture against unauthorized logins.

**Network Access**

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.

Action	Start IP Address ↑	End IP Address	Description
Edit   Del	10.0.1.1	10.0.1.255	London Office
Edit   Del	172.16.1.1	172.16.1.255	Singapore Office
Edit   Del	192.168.1.1	192.168.1.255	New York Headquarters

## 8. Audit Trail

- Monitored 6 months of configuration changes.
- Captured modifications in fields, layouts, and sharing settings.
- Enabled admin accountability and compliance reporting.

**View Setup Audit Trail**

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 12:21:21 AM PDT	vradhi.valecha.cs22601@agentforce.com		Updated Ip AllowList from 192.168.1.1 to 192.168.1.255	Security Controls	
9/26/2025, 12:21:09 AM PDT	vradhi.valecha.cs22601@agentforce.com		Added Ip AllowList from 172.16.1.1 to 172.16.1.255	Security Controls	
9/26/2025, 12:20:47 AM PDT	vradhi.valecha.cs22601@agentforce.com		Added Ip AllowList from 10.0.1.1 to 10.0.1.255	Security Controls	
9/26/2025, 12:20:28 AM PDT	vradhi.valecha.cs22601@agentforce.com		Added Ip AllowList from 192.168.1.1 to 192.168.1.255	Security Controls	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Username Password was set to High Assurance	Session Settings	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 12:18:16 AM PDT	vradhi.valecha.cs22601@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 11:07:04 PM PDT	vradhi.valecha.cs22601@agentforce.com		Changed Carbon Emission page layout Carbon_Emission_RT_Layout	Custom Objects	
9/26/2025, 11:07:04 PM PDT	vradhi.valecha.cs22601@agentforce.com		Changed Carbon Emission page layout Carbon Emission Layout	Custom Objects	
9/26/2025, 11:07:04 PM PDT	vradhi.valecha.cs22601@agentforce.com		Created custom field Scope (Picklist) on Carbon Emissions	Custom Objects	
9/26/2025, 1:23:44 PM PDT	vradhi.valecha.cs22601@agentforce.com		Changed TestCarbonCalculator Apex Class code	Apex Class	
9/26/2025, 11:45:20 AM PDT	vradhi.valecha.cs22601@agentforce.com		Requested an export	Data Export	
9/26/2025, 11:33:33 AM PDT	vradhi.valecha.cs22601@agentforce.com		For the 01lgL000002FYI3 duplicate rule Prevent Duplicate Emission Source Names, changed "Active" from "false" to "true"	Duplicate Rule	