

Phase 9: Reporting, Dashboards & Security Review

Objective

To provide **real-time insights** into case management operations using **Salesforce Reports & Dashboards**, while ensuring **data security** through **Profiles, Permission Sets, and Field-Level Security (FLS)**.

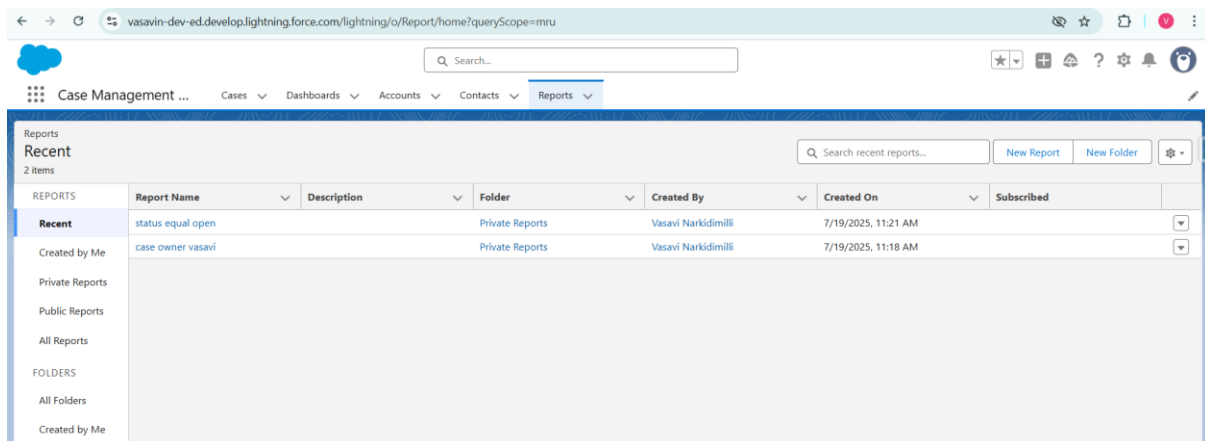
Reports Implemented

1. Open Cases Report

- Filters: **Status = Open**
- Displays all active cases that need attention.
- Helps monitor **pending work** and ensures timely follow-up.

2. Cases by Owner Report

- Filters: **Case Owner = Vasavi**
- Shows all cases assigned to you.
- Helps track **personal workload and case progress**.



The screenshot shows the Salesforce Reports page. The browser address bar displays 'vasavin-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui'. The page header includes a search bar and navigation tabs for Case Management, Cases, Dashboards, Accounts, Contacts, and Reports. The main content area is titled 'Reports' and 'Recent' with a sub-header '2 items'. A table lists the reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains two entries: 'status equal open' and 'case owner vasavi', both created by 'Vasavi Narkidimilli' on 7/19/2025. A left sidebar shows navigation options for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (All Folders, Created by Me).

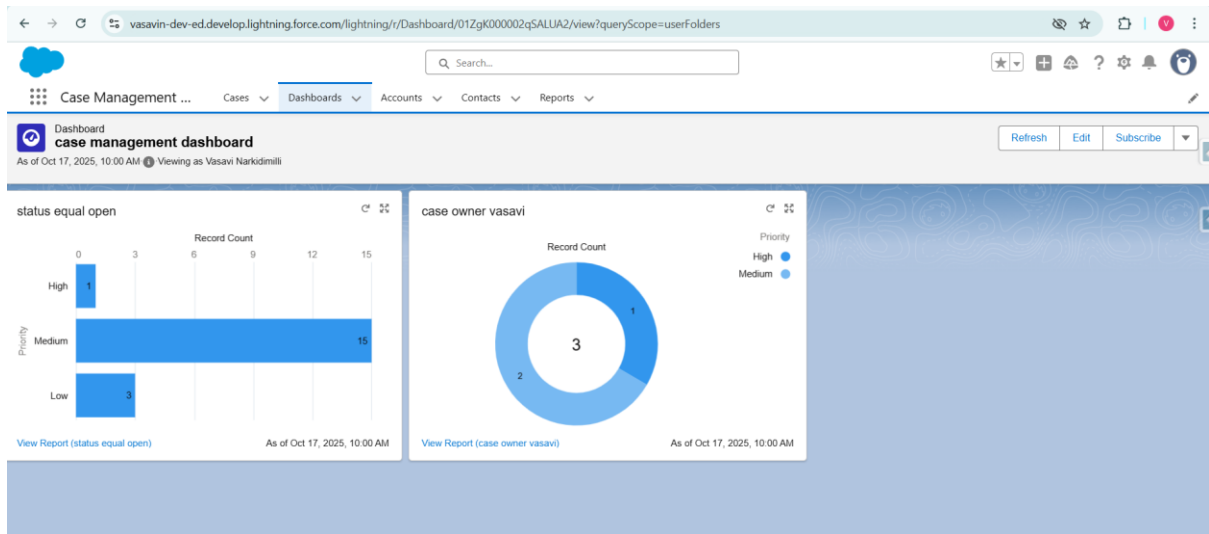
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	status equal open		Private Reports	Vasavi Narkidimilli	7/19/2025, 11:21 AM	
Created by Me	case owner vasavi		Private Reports	Vasavi Narkidimilli	7/19/2025, 11:18 AM	

Dashboard Implemented

Case Management Dashboard

- Combines the above reports into a **single, visual interface**:
 - Open Cases chart → Quick overview of all pending cases
 - Cases by Owner chart/table → Shows case assignments for agents
- Provides a **centralized view of case status and workload**

- Dashboard is **role-based**: Admin sees all cases, while agents see only their assigned cases



Security Review

1. Profiles & Roles

- **Admin** → Full access to all objects, reports, and dashboard
- **Support Agent (Vasavi)** → Access to own cases and dashboard, limited visibility to other data

2. Field-Level Security (FLS)

- Sensitive fields (e.g., customer contact info, emails) restricted based on role
- Ensures **data privacy** while allowing actionable insights

3. Tab & Record Access

- Case tab visible to Admin and Agents
- Record-level access controlled via **Ownership & Roles**

Benefits

- Provides **real-time visibility** into open cases and workload
- Helps **manage personal and team performance** efficiently
- Strengthens **security** by restricting sensitive data based on roles
- Enables quick **decision-making and follow-up** on high-priority cases