Phase 9 Summary: Reporting, Dashboards & Security Review

Project: Residential Maintenance Request Portal

This phase focused on visualizing your application's data to gain business insights and reviewing key security settings to ensure data is properly protected.

1. Custom Report Type: Property Units with Maintenance Requests

- **Purpose**: To create a reusable template that joins the **Property Unit** and **Maintenance Request** objects, allowing for reports that combine data from both.

- **Key Actions**: A new report type was created with Property Units as the primary object. This allows for building reports that can show all properties, including those that may not have any open maintenance requests.
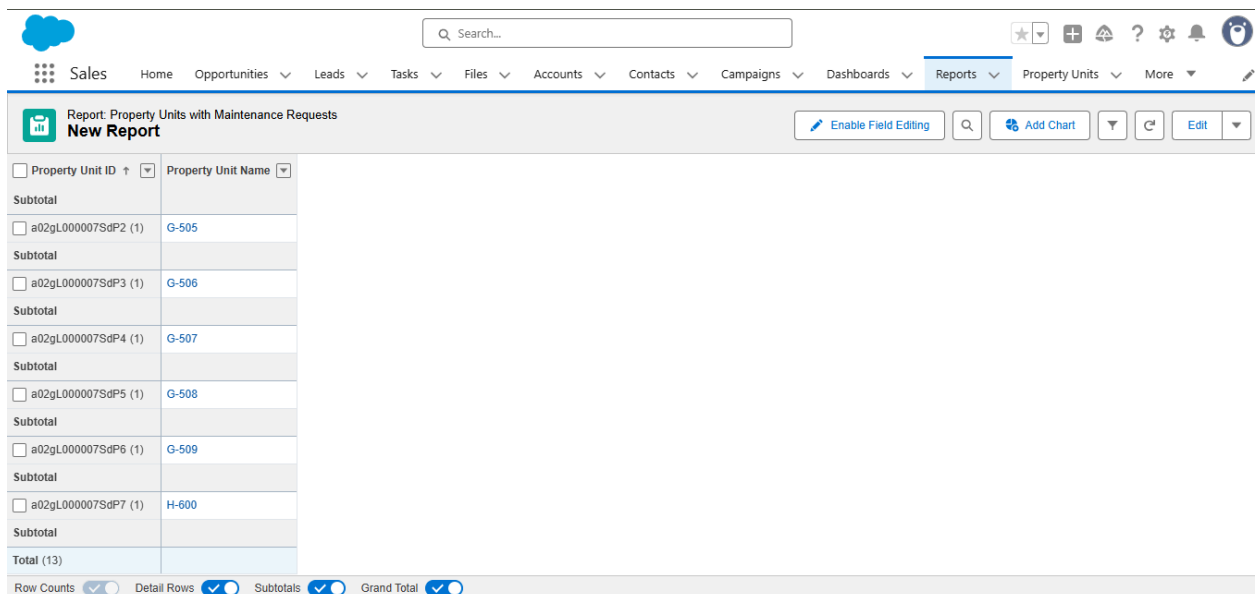
2. Report: Maintenance Requests by Status

- **Purpose**: To analyze and summarize all maintenance requests based on their current operational status.

- **Key Actions**: A new report was built using the custom report type. The data was grouped by the
  Status field to provide a clear summary of how many requests are new, in progress, or completed.
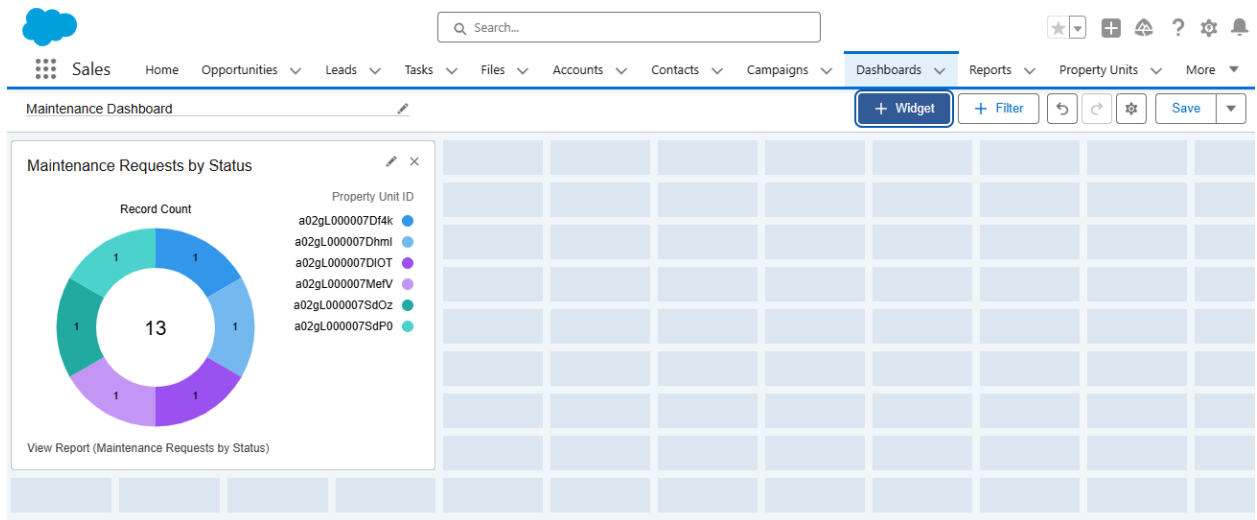

3. Dashboard: Maintenance Dashboard

- **Purpose**: To provide an at-a-glance, visual representation of key business metrics from your reports[5].

- **Key Actions**: A new dashboard was created. A
  Donut Chart component was added to it, using the Maintenance Requests by Status report as its source, to visually display the breakdown of requests[6].

4. Security Review: Field Level Security

- **Purpose**: To understand how to control user access to specific fields on an object, ensuring users can only see and edit the data relevant to their role[7].

- **Key Actions**: The **Field Level Security** settings for the Maintenance Technician profile on the Maintenance Request object were reviewed. This exercise demonstrated how an administrator can make fields visible, read-only, or hidden for a specific group of users[8].