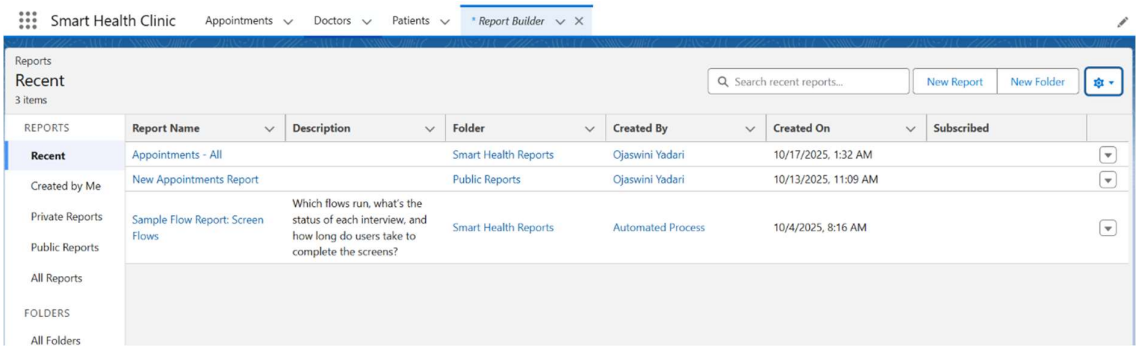
Phase 9: Reporting, Dashboards & Security Review

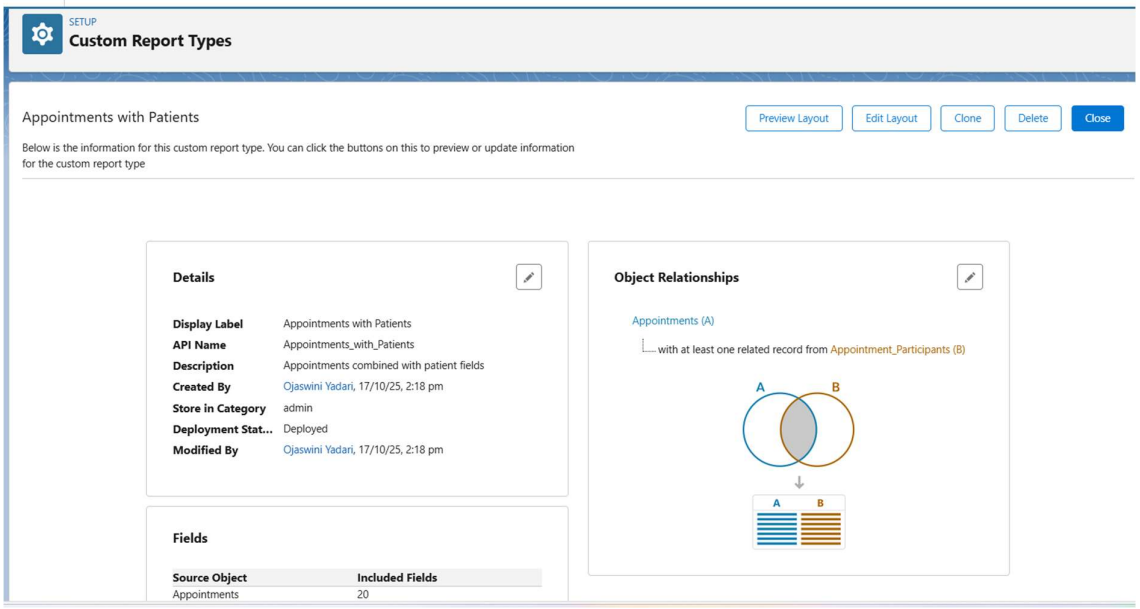
1. Reports (Tabular, Summary, Matrix, Joined)

Reports help analyze and visualize data in Salesforce. A Tabular report shows data in simple rows and columns (like a spreadsheet). A Summary report groups data (for example, appointments by doctor). A Matrix report allows grouping by both rows and columns for comparison. A Joined report combines multiple report types in one view. These reports are created using the "Reports" tab, where you can select the object, apply filters, and group fields as needed.



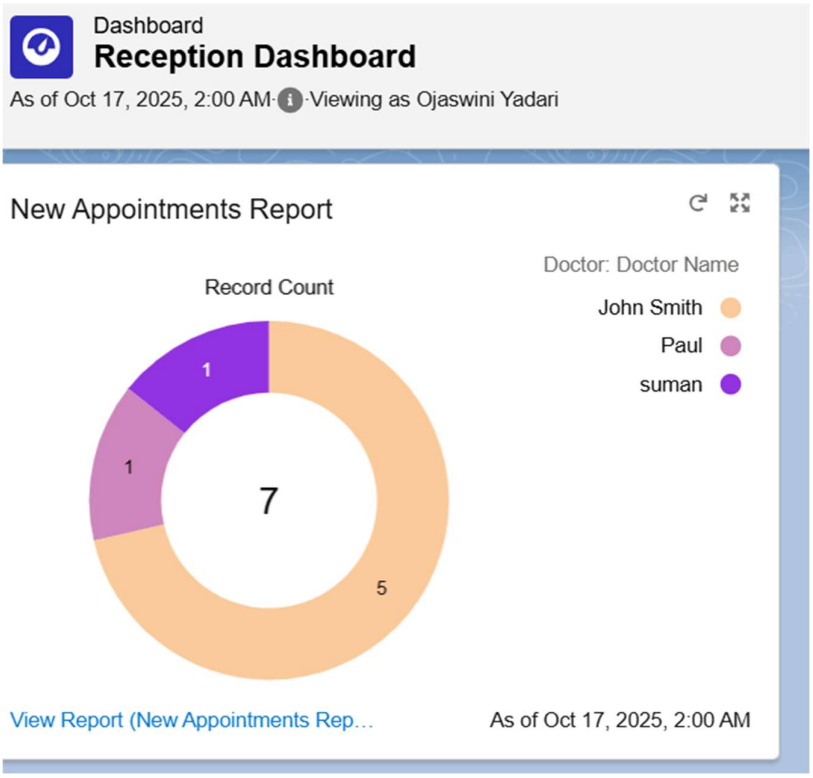
2.ReportTypes

Report Types define which objects and fields are available in a report. You can create custom report types in **Setup → Report Types → New Custom Report Type**. For example, a report type "Appointments with Patients" can include both Appointment and Patient objects. Custom report types give flexibility to include relationships and custom fields that standard reports may not show.



3.Dashboards

Dashboards display report data visually using charts, graphs, and gauges. You can create a new dashboard in **App Launcher → Dashboards → New Dashboard**, then add components that use existing reports. Dashboards make it easier to track metrics like daily appointments or active patients at a glance.

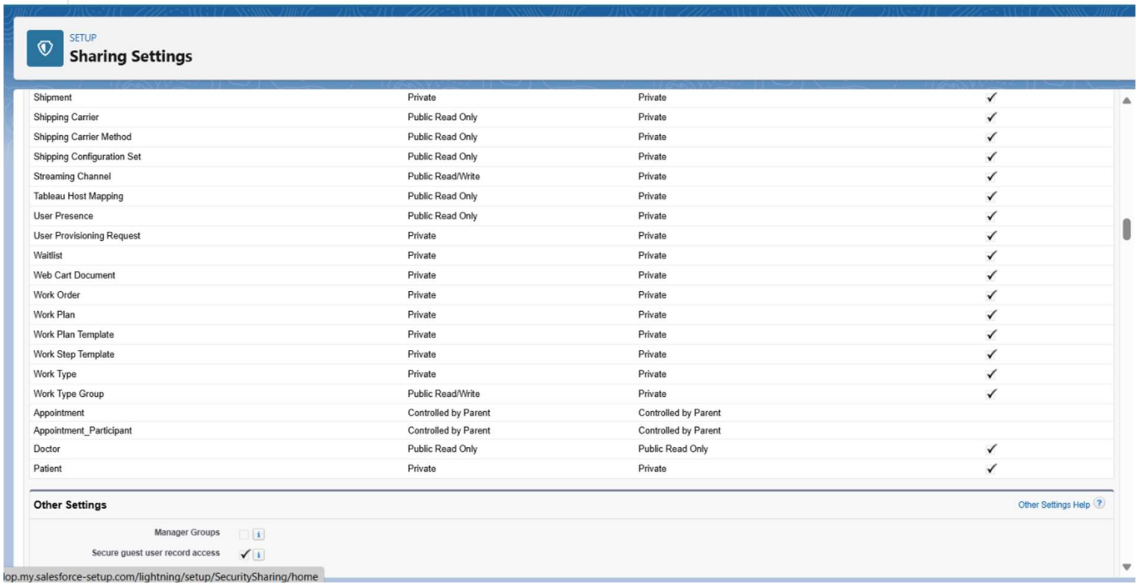


4.DynamicDashboards

Dynamic Dashboards allow each user to see data according to their own access level. This means a receptionist, doctor, or admin can all use the same dashboard but see only their own records. You can enable this by choosing "Run as Logged-in User" when creating or editing a dashboard. It improves security and personalization of reports.

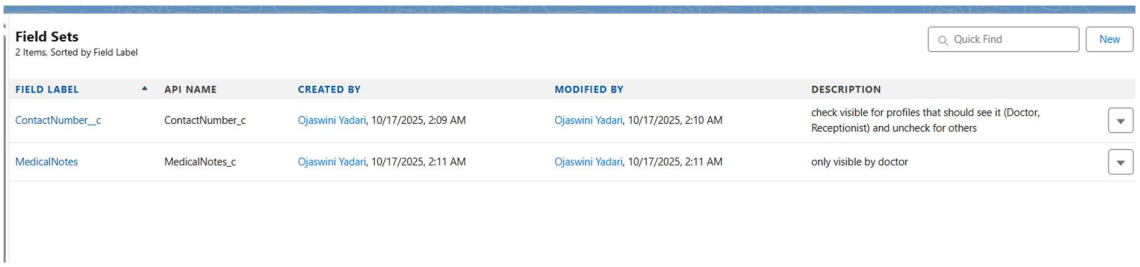
5.SharingSettings

Sharing settings control the visibility of records for users. In **Setup → Sharing Settings**, you can define the **Organization-Wide Defaults (OWD)** for each object, such as Public Read/Write or Private. You can also create **Sharing Rules** to open up access for certain roles or groups. Proper sharing ensures sensitive data is visible only to authorized users.



6.FieldLevelSecurity(FLS)

Field Level Security controls access to individual fields in an object. In **Setup → Object Manager → [Object Name] → Fields & Relationships**, you can edit field visibility by profile or permission set. This ensures users see only the fields they need— for example, hiding a patient's confidential notes from non-medical staff.

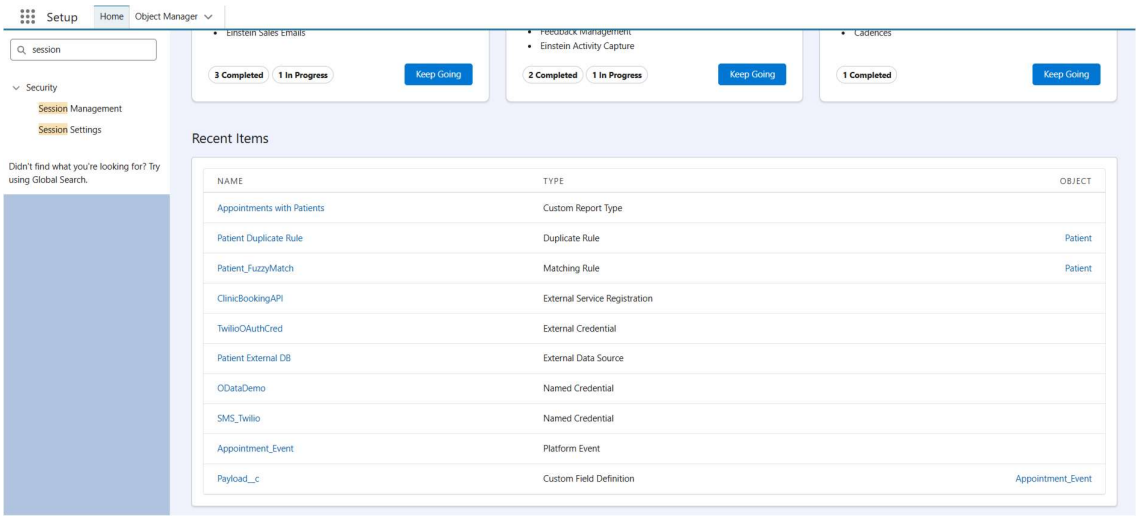


7.SessionSettings

Session settings manage how long a user can stay logged in and add extra protection to login sessions. In **Setup → Session Settings**, you can set session timeout duration, enable IP locking, and force re-login after session timeout. This prevents unauthorized access if a user leaves a system unattended.

8.LoginIPRanges

Login IP Ranges help secure logins to Salesforce from trusted network locations. Go to **Setup → Profiles → [Profile Name] → Login IP Ranges** and define allowed IP address ranges. Users logging in from outside these ranges will be blocked, reducing the risk of unauthorized access.



9. Audit Trail

Audit Trail tracks configuration changes made in your org, showing who changed what and when. You can find it in Setup → View Setup Audit Trail. It helps admins review system changes like field edits, user role updates, or security modifications. This improves accountability and makes troubleshooting easier.