Library Management – Phase 2: Org Setup & Configuration

1.Overview

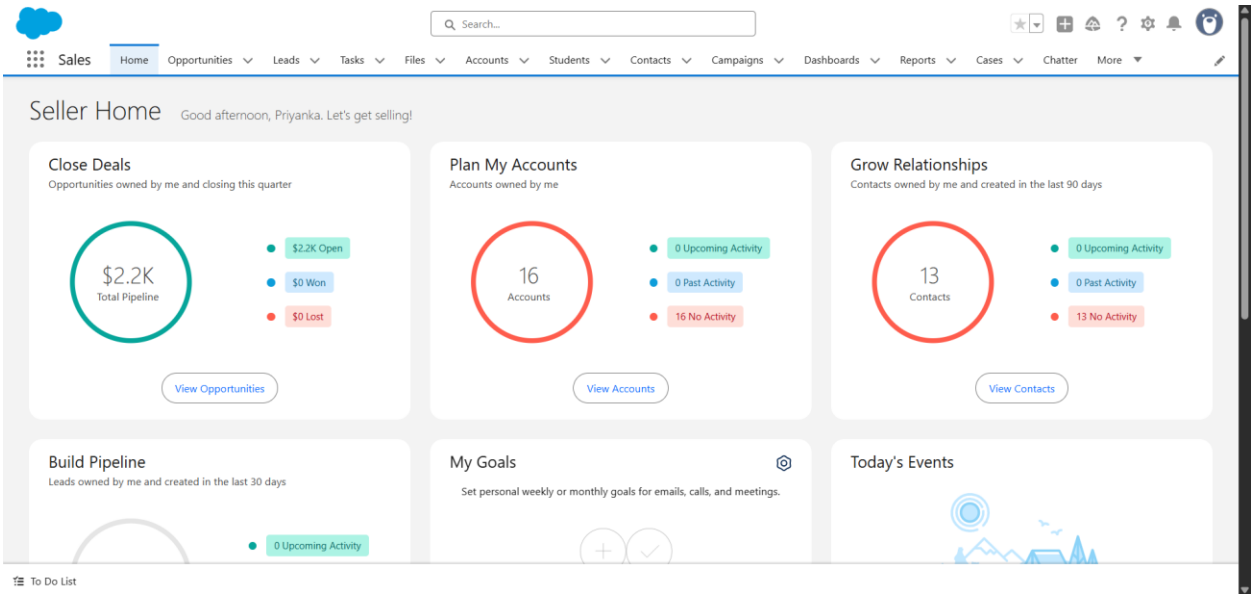
In this phase, we establish a Salesforce Developer Org to represent a small library system for cataloguing, lending, and returns. Building on Phase 1, we'll configure book records, define librarian/member roles, and apply security measures so the system mirrors real-world library operations—adding, editing, deleting, and viewing books.

2.Goal

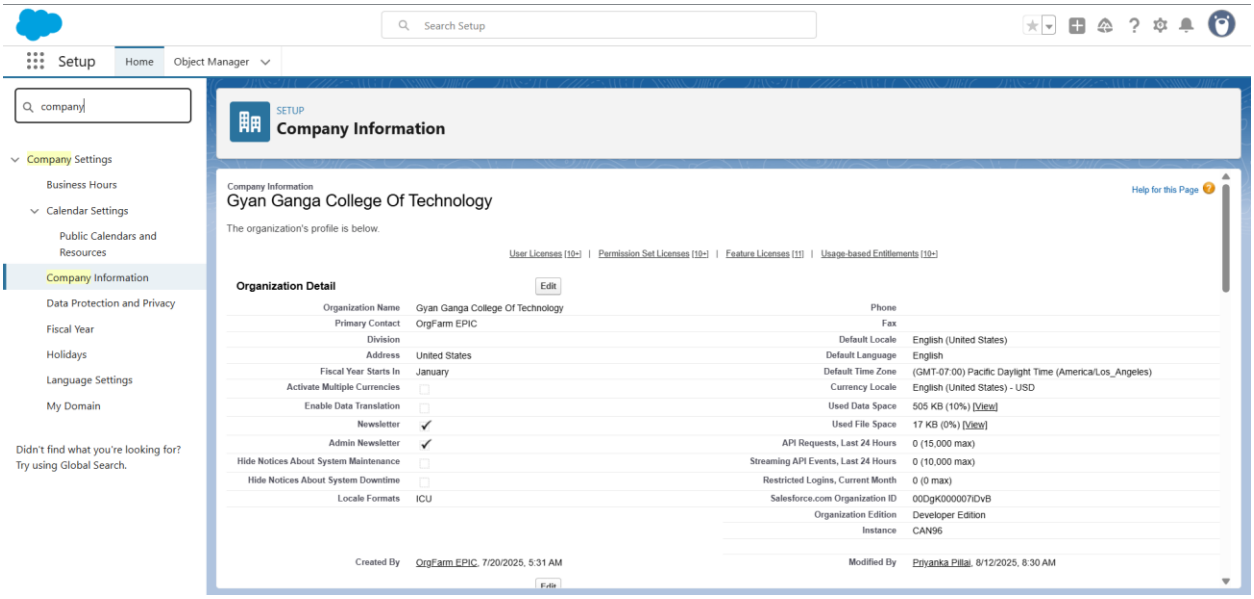
Set up a dedicated Salesforce Developer Org called **"Library Connect"**. This will include creating sample users (Head Librarian, Librarian, and Member), implementing Org-Wide Defaults (OWD) and sharing rules to safeguard book data, and demonstrating how book entries, updates, and visibility vary by role. This setup also prepares the platform for adding new fields and integrating external systems in the future.

Step 1: Salesforce Edition – Sign-Up & Access

- Register for a **Salesforce Developer Edition**.
- Log in to the **Lightning Experience**.
- Verify that you can access the **Setup** area using the gear icon.



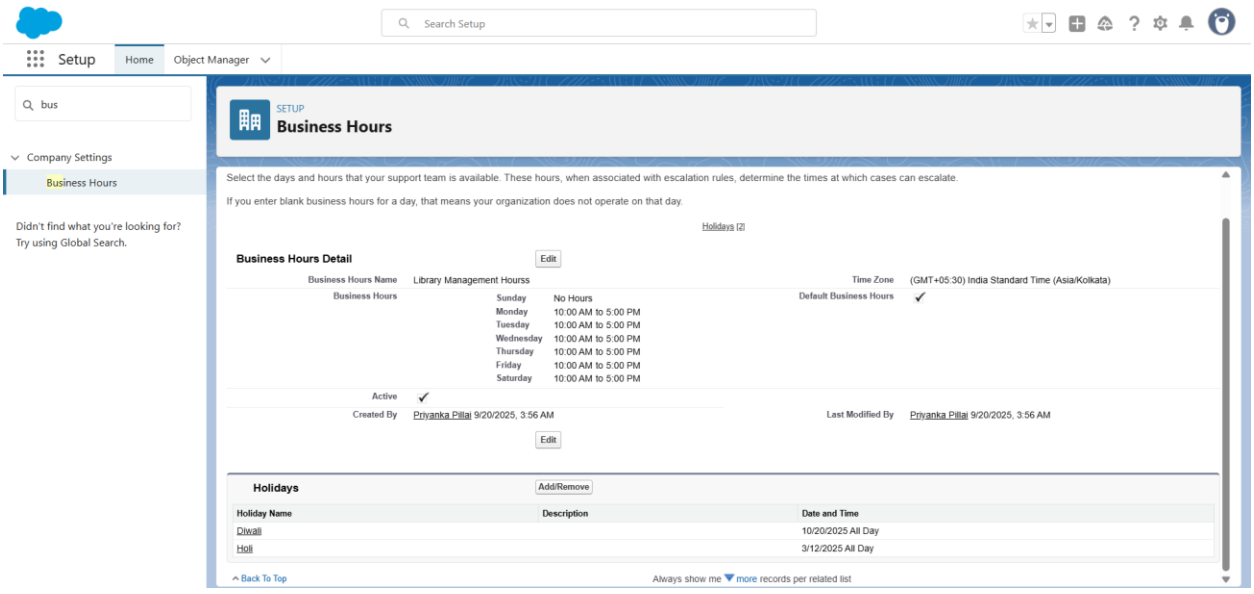
Step 2:- •Company Profile Setup



Step 3:- • Business Hours & Holidays

Created " Library Management Hours" Mon-Sat 10 AM-5 PM.

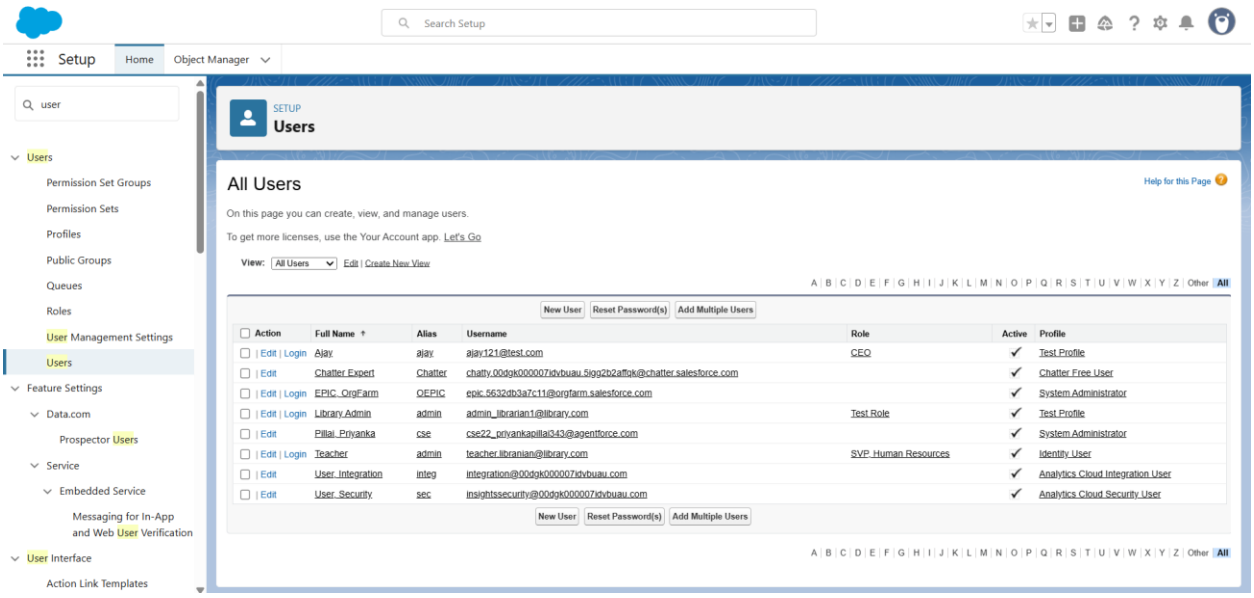
Added relevant Holidays and linked them to Business Hours.



Step 4 — Users

- Created 3 sample users:

Display Name	Username (example)	Profile	Role
Librarian Admin	admin_librarian1@library.com	Test Profile	Test Role
Teacher	Teacher.libranian@library.com	Identity User	SVP,Human Resouces



Step 5 Profiles

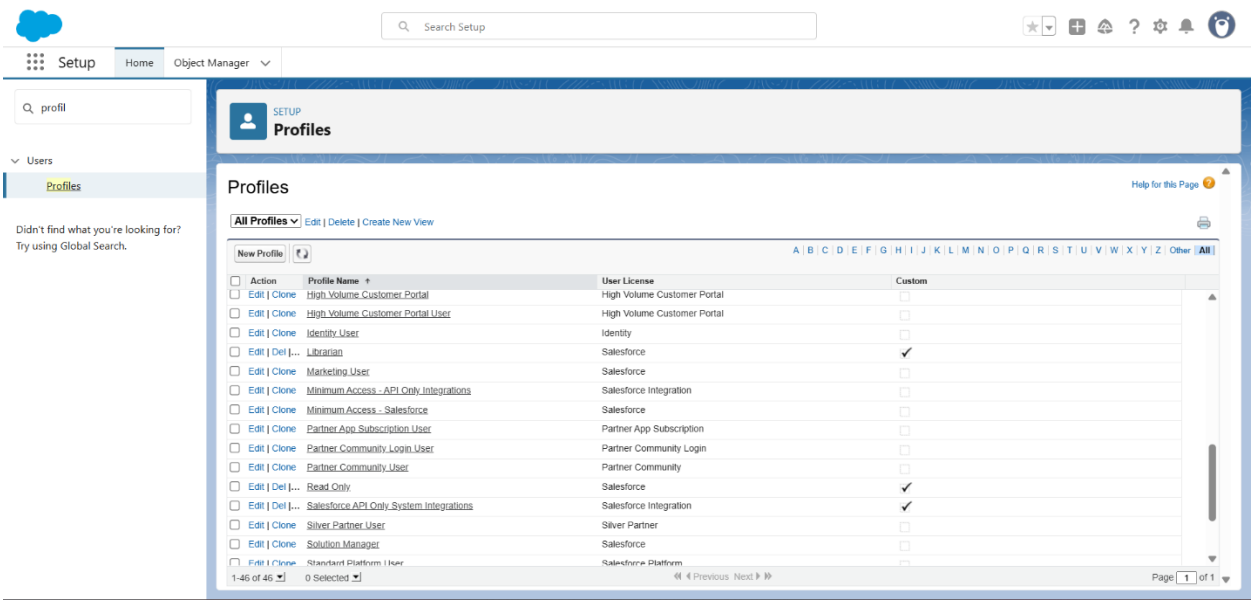
Cloned Standard User → created Librarian profile.

Cloned Standard User → created Teacher profile.

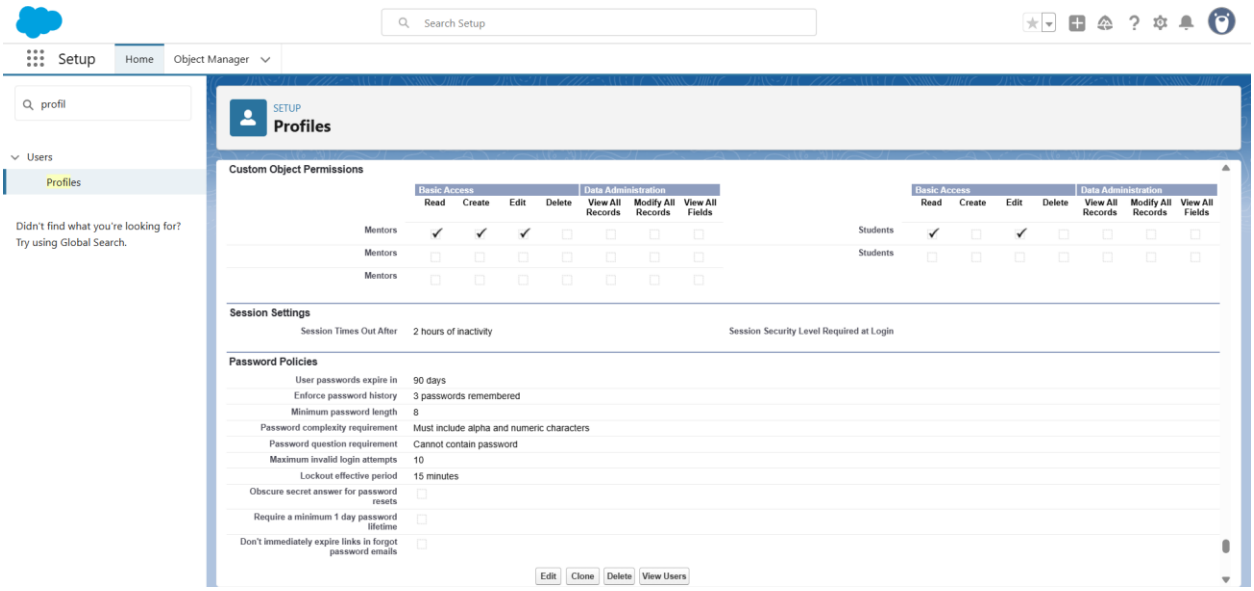
Adjusted Object Permissions:

Mentor = Read/Create/Edit/Delete

Student = Read/Edit/Create



Librarian Profile

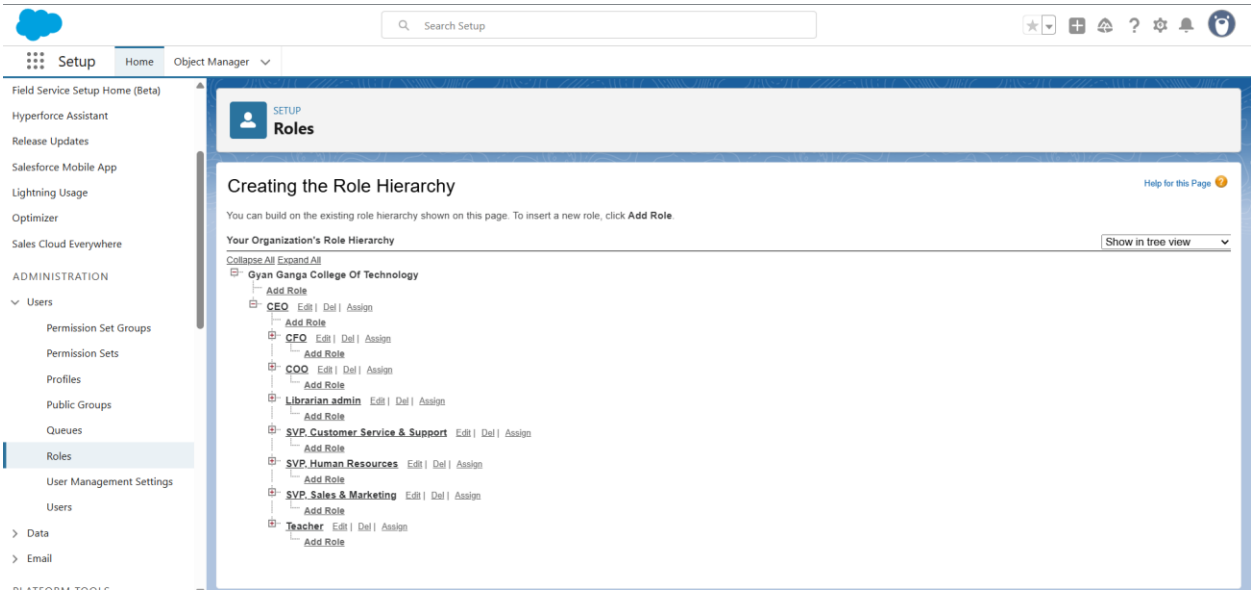


Teacher Profile

Step 6 — Role Hierarchy

Created simple hierarchy

- **Librarian Admin**
  - **Librarian**
  - **Teacher**

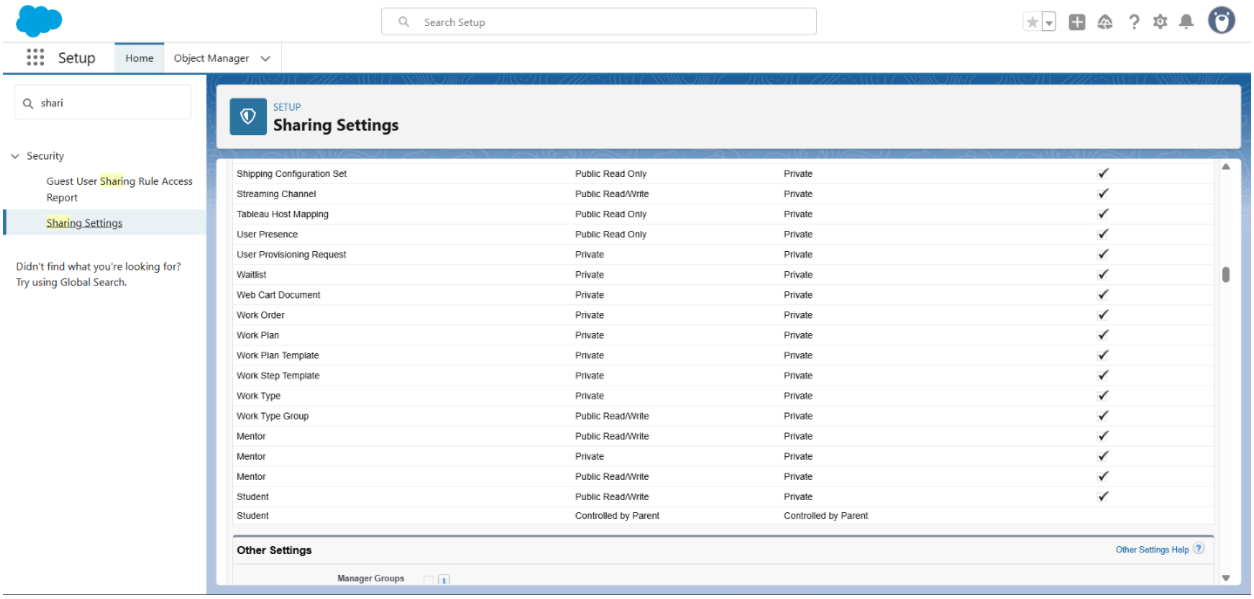


Step 7 Org:- Wide Defaults (OWD)

Setup → Sharing Settings

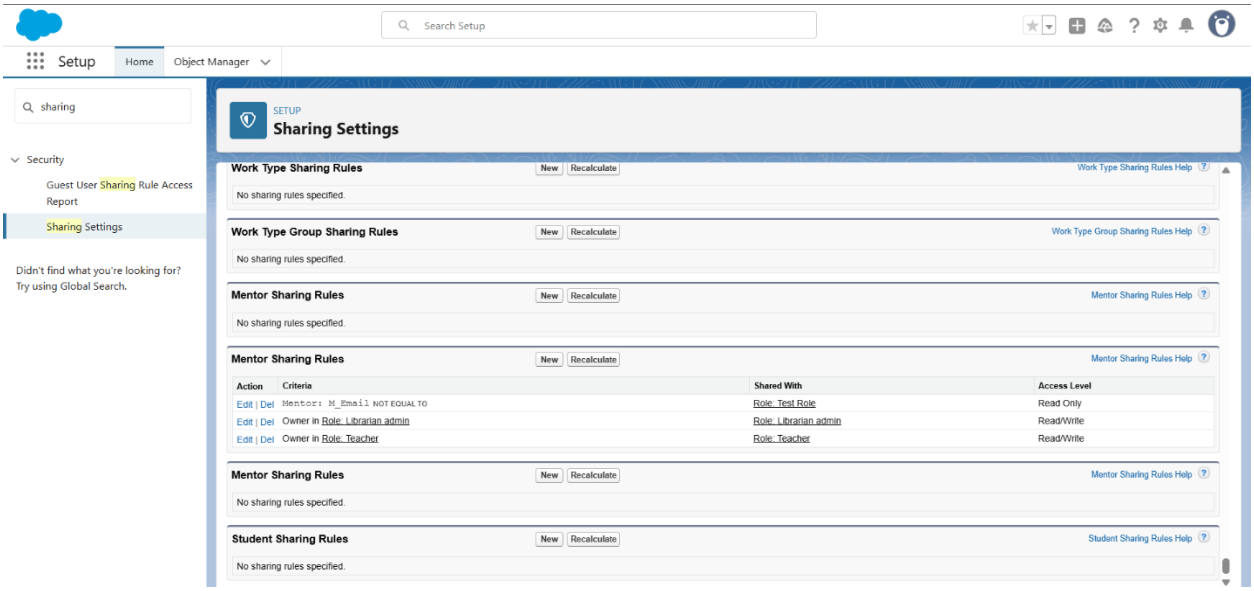
Mentor_c = Private.

Student_c = Controlled by Parent .



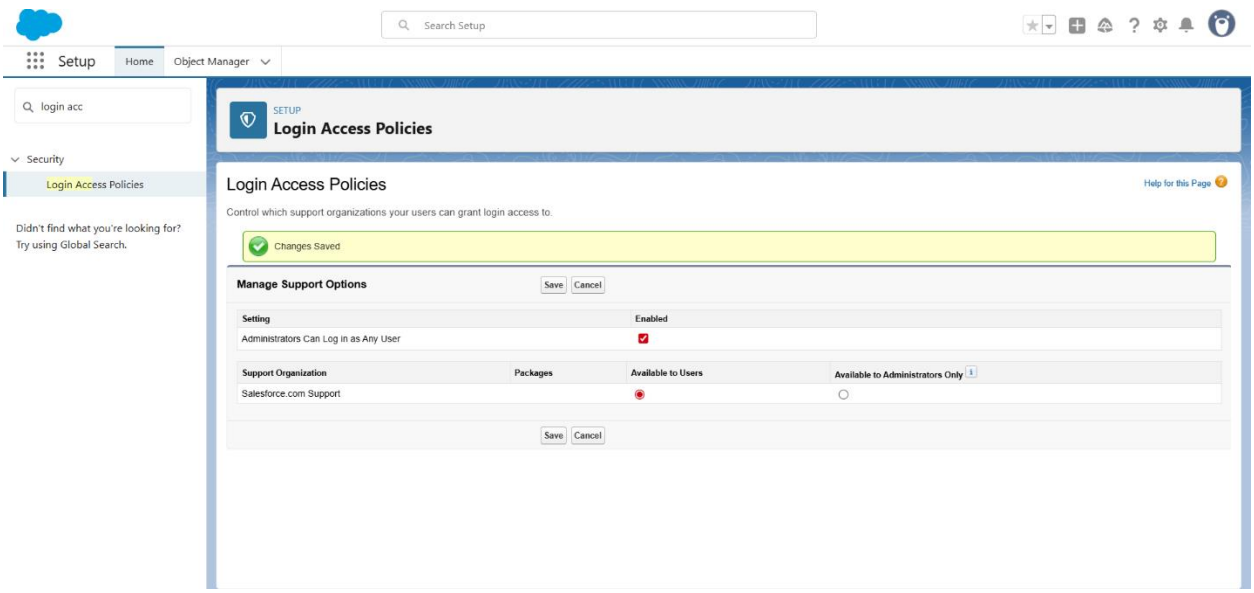
Step 8 : Sharing Rules

- **Created Public Group “Librarian” containing all Library users.**
- **Created Owner-based sharing rule:**
  - **o Owned by: Teacher admin**
  - **o Share with: Librarian admin**
  - **o Access Level: Read/Write.**



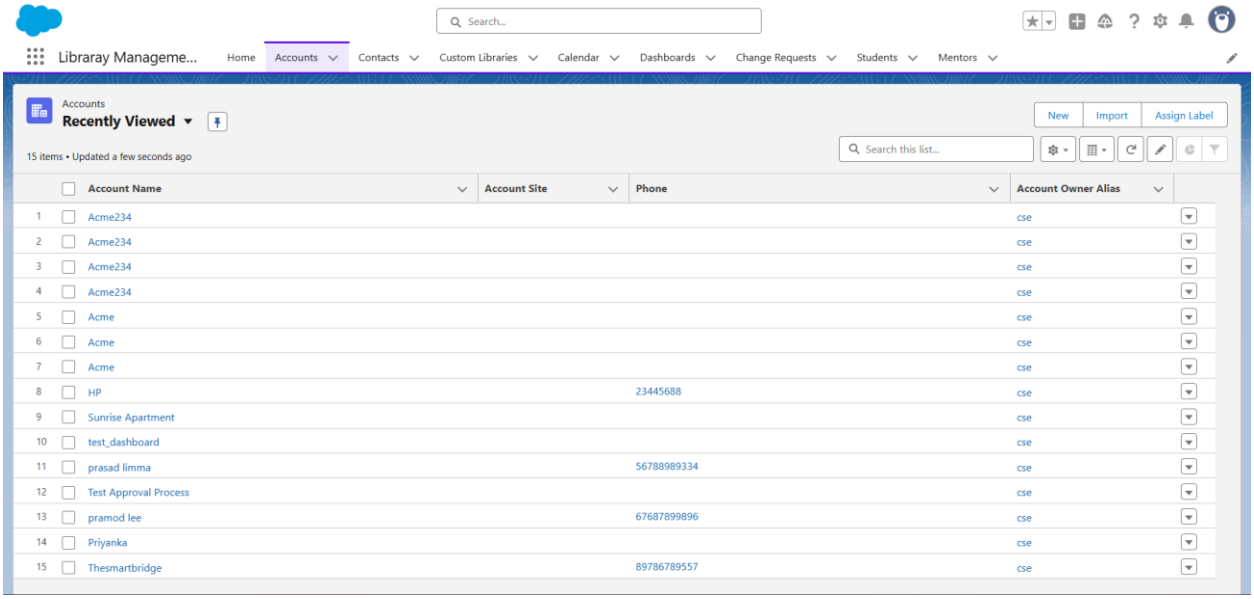
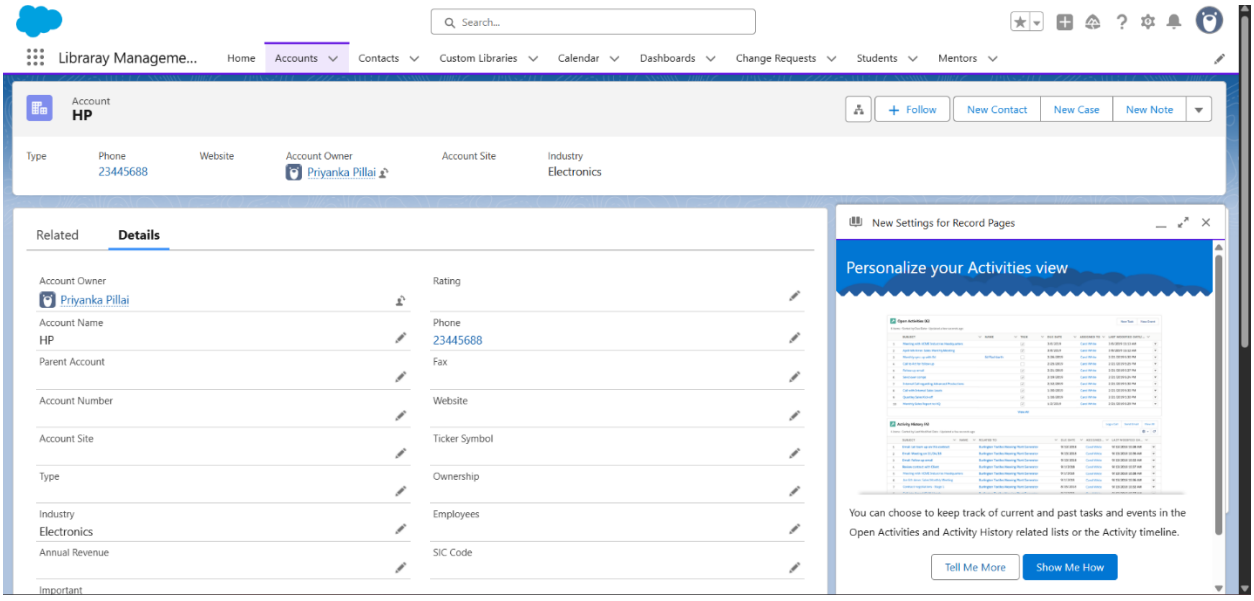
Step 9:- Login Access Policy

- **Enabled Administrators Can Log in as Any User.**



Step 10 — Library Management Lightning App

- **Setup → App Manager → New Lightning App “Library Management**



Step 11 : - Testing