

## Library Management – Phase 2: Org Setup & Configuration

### 1. Overview

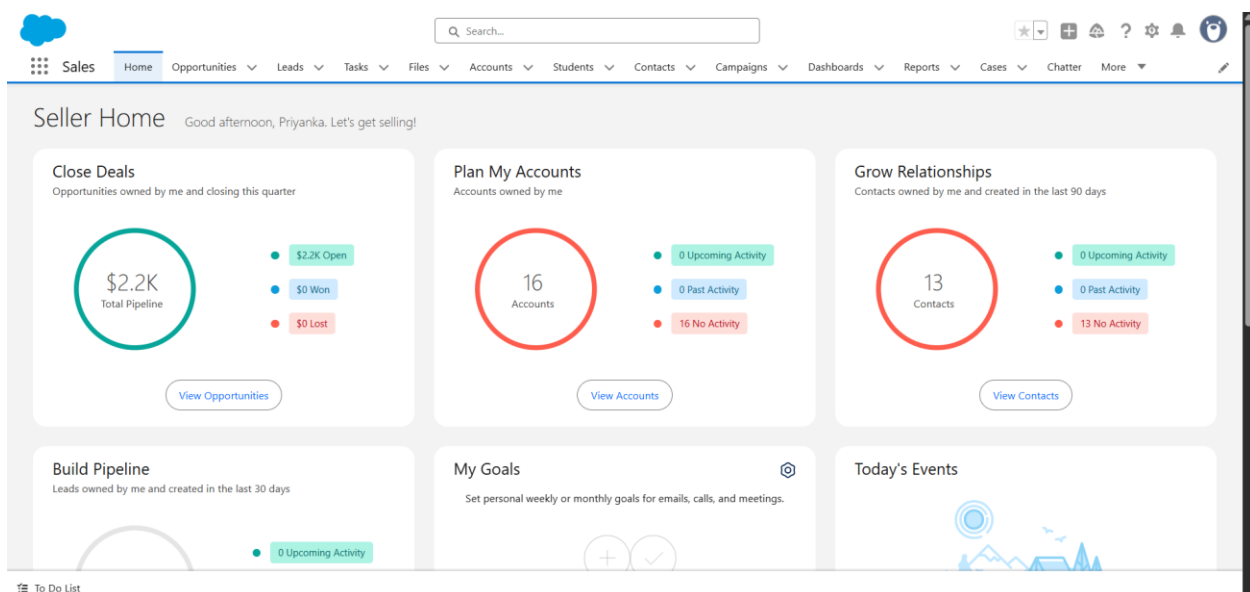
In this phase, we establish a Salesforce Developer Org to represent a small library system for cataloguing, lending, and returns. Building on Phase 1, we'll configure book records, define librarian/member roles, and apply security measures so the system mirrors real-world library operations—adding, editing,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

### 2. Goal

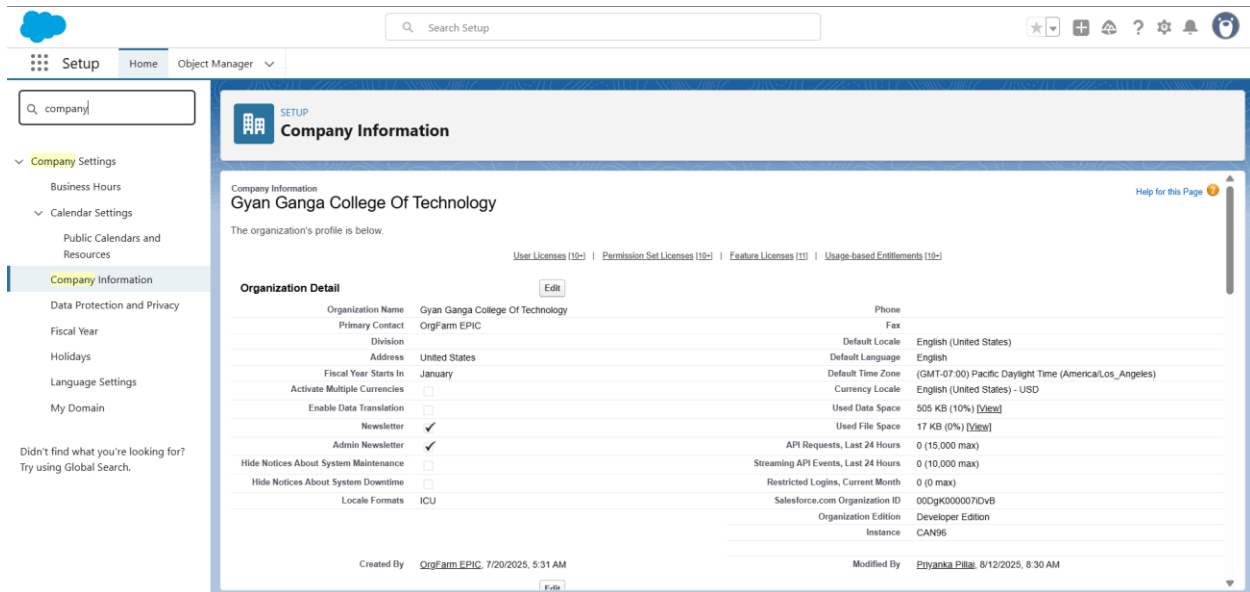
Set up a dedicated Salesforce Developer Org called **“Library Connect”**. This will include creating sample users (Head Librarian, Librarian, and Member), implementing Org-Wide Defaults (OWD) and sharing rules to safeguard book data, and demonstrating how book entries, updates, and visibility vary by 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



The screenshot shows the 'Company Information' page in Salesforce Setup. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below the sidebar, there's a search bar with 'company' entered. The main content area is titled 'Company Information' and shows details for 'Gyan Ganga College Of Technology'. It includes a 'Help for this Page' link. The 'Organization Detail' section has an 'Edit' button. The details are organized into two columns. The left column includes: Organization Name (Gyan Ganga College Of Technology), Primary Contact (Org'arm EPIC), Division, Address (United States), Fiscal Year Starts In (January), Activate Multiple Currencies (checkbox), Enable Data Translation (checkbox), Newsletter (checkbox), Admin Newsletter (checkbox), Hide Notices About System Maintenance (checkbox), Hide Notices About System Downtime (checkbox), and Locale Formats (ICU). The right column includes: Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (505 KB (10%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (000gk000007D0VB), Organization Edition (Developer Edition), Instance (CAN96), Created By (Org'arm EPIC, 7/20/2025, 5:31 AM), and Modified By (Priyanka Pillai, 8/12/2025, 8:30 AM).

Company Information  
Gyan Ganga College Of Technology

The organization's profile is below.

[User Licenses \(102\)](#) | [Permission Set Licenses \(102\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(102\)](#)

**Organization Detail** [Edit](#)

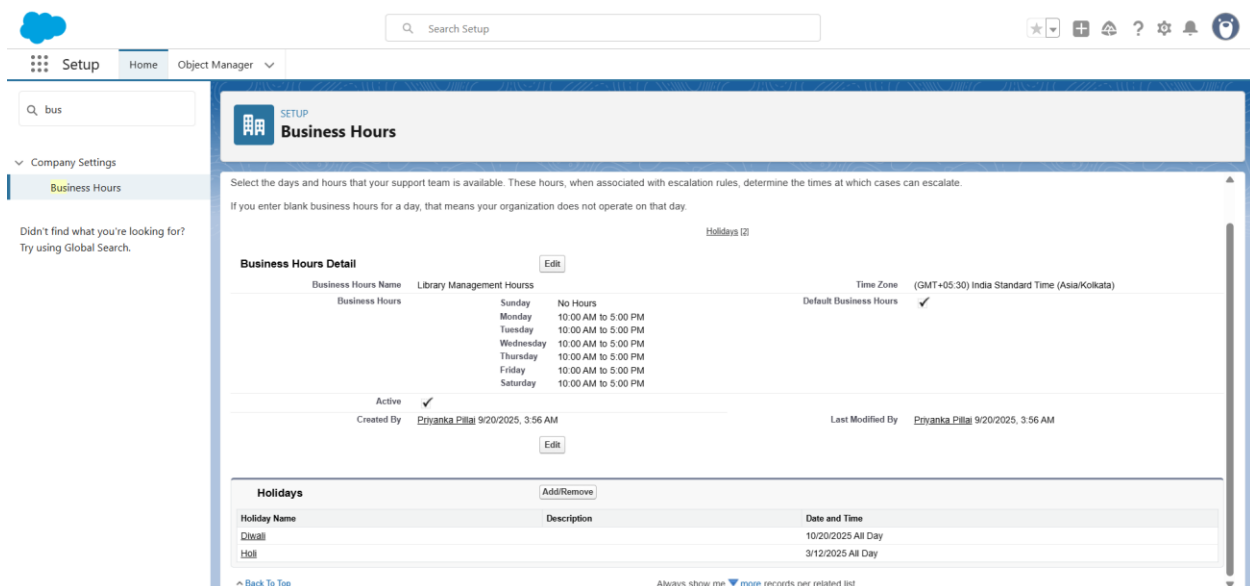
Organization Name	Gyan Ganga College Of Technology	Phone	
Primary Contact	Org'arm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	505 KB (10%) <a href="#">[View]</a>
Newsletter	<input type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	000gk000007D0VB
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	Org'arm EPIC, 7/20/2025, 5:31 AM	Modified By	Priyanka Pillai, 8/12/2025, 8:30 AM

[\[Edit\]](#)

## Step 3:- • Business Hours & Holidays

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

Added relevant Holidays and linked them to Business Hours.



The screenshot shows the 'Business Hours' page in Salesforce Setup. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below the sidebar, there's a search bar with 'bus' entered. The main content area is titled 'Business Hours' and shows details for 'Library Management Hours'. It includes a 'Help for this Page' link. The 'Business Hours Detail' section has an 'Edit' button. The details are organized into two columns. The left column includes: Business Hours Name (Library Management Hours), Business Hours (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday), Active (checkbox), Created By (Priyanka Pillai, 9/20/2025, 3:56 AM), and Last Modified By (Priyanka Pillai, 9/20/2025, 3:56 AM). The right column includes: Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Default Business Hours (checkbox), and a table of business hours for each day. The table has columns for Day, Start Time, and End Time. The data is as follows: Sunday (No Hours), Monday (10:00 AM to 5:00 PM), Tuesday (10:00 AM to 5:00 PM), Wednesday (10:00 AM to 5:00 PM), Thursday (10:00 AM to 5:00 PM), Friday (10:00 AM to 5:00 PM), and Saturday (10:00 AM to 5:00 PM).

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \(2\)](#)

**Business Hours Detail** [Edit](#)

Business Hours Name	Library Management Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday Monday Tuesday Wednesday Thursday Friday Saturday	Default Business Hours	<input checked="" type="checkbox"/>
	No Hours 10:00 AM to 5:00 PM 10:00 AM to 5:00 PM 10:00 AM to 5:00 PM 10:00 AM to 5:00 PM 10:00 AM to 5:00 PM 10:00 AM to 5:00 PM		
Active	<input checked="" type="checkbox"/>		
Created By	Priyanka Pillai, 9/20/2025, 3:56 AM	Last Modified By	Priyanka Pillai, 9/20/2025, 3:56 AM

[\[Edit\]](#)

**Holidays** [Add/Remove](#)

Holiday Name	Description	Date and Time
Divali		10/20/2025 All Day
Holi		3/12/2025 All Day

[^ Back To Top](#) [Always show me more records per related list](#)

## 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.librarian@library.com	Identity User	SVP,Human Resouces

The screenshot displays the Salesforce Setup page for Users. The page title is "All Users". Below the title, there is a brief description: "On this page you can create, view, and manage users. To get more licenses, use the Your Account app. [Let's Go](#)".

The main content area shows a table of users. The table has the following columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including "alay", "Chatter\_Expert", "EPIC\_OrgFarm", "Library\_Admin", "Pillai\_Priyanka", "Teacher", "User\_Integration", and "User\_Security". Each user row has a checkbox for selection and links for "Edit" and "Login".

The sidebar on the left contains navigation options: Setup, Home, Object Manager, and a search bar. The "Users" section is expanded, showing sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The "Users" option is selected.

The top navigation bar includes a search bar, a "Search Setup" button, and various icons for navigation and help.

## Step 5 Profiles

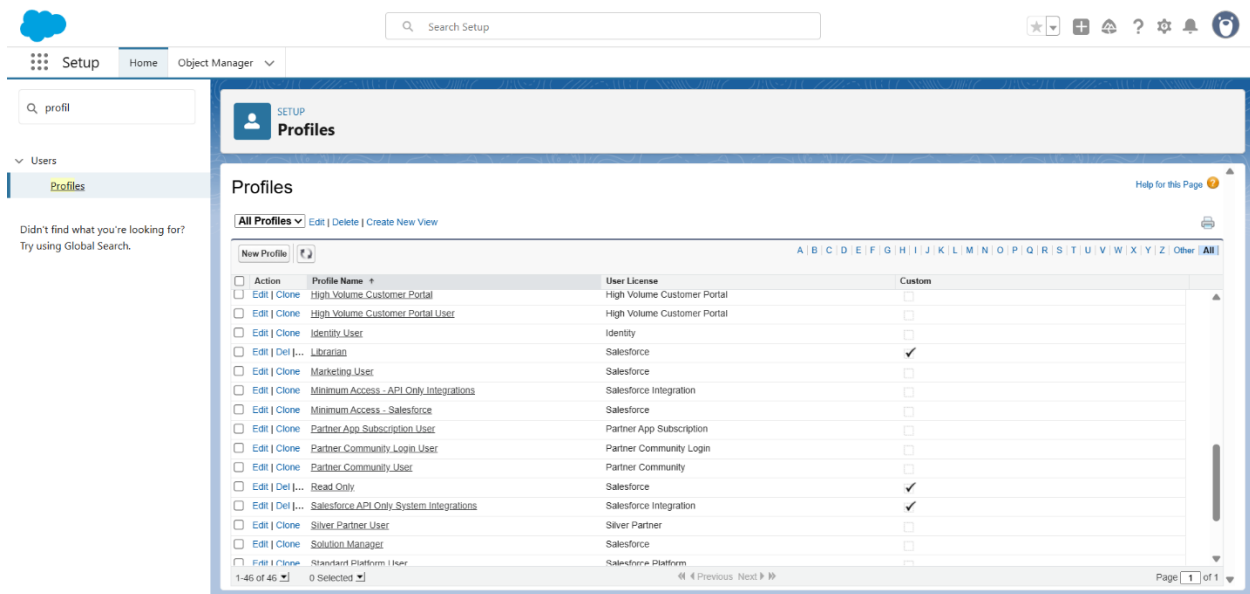
Cloned Standard User → created Librarian profile.

Cloned Standard User → created Teacher profile.

Adjusted Object Permissions:

Mentor = Read/Create/Edit/Delete

Student = Read/Edit/Create



Setup Profiles

Profiles

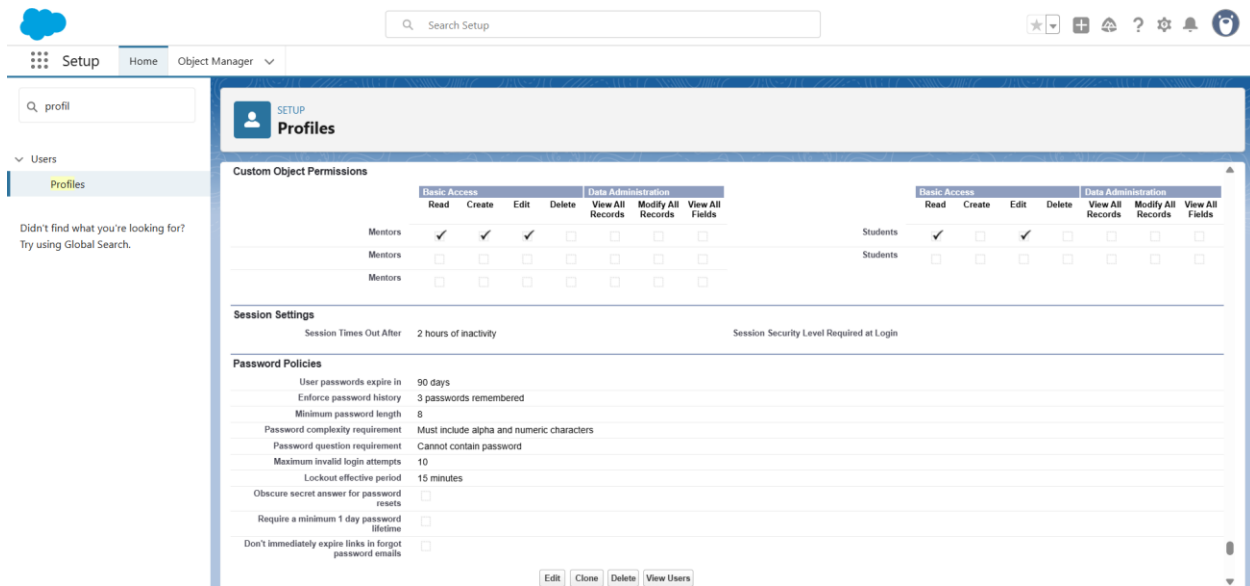
All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Identity User	Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Librarian	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community User	Partner Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>

1-46 of 46 | 0 Selected | Previous Next

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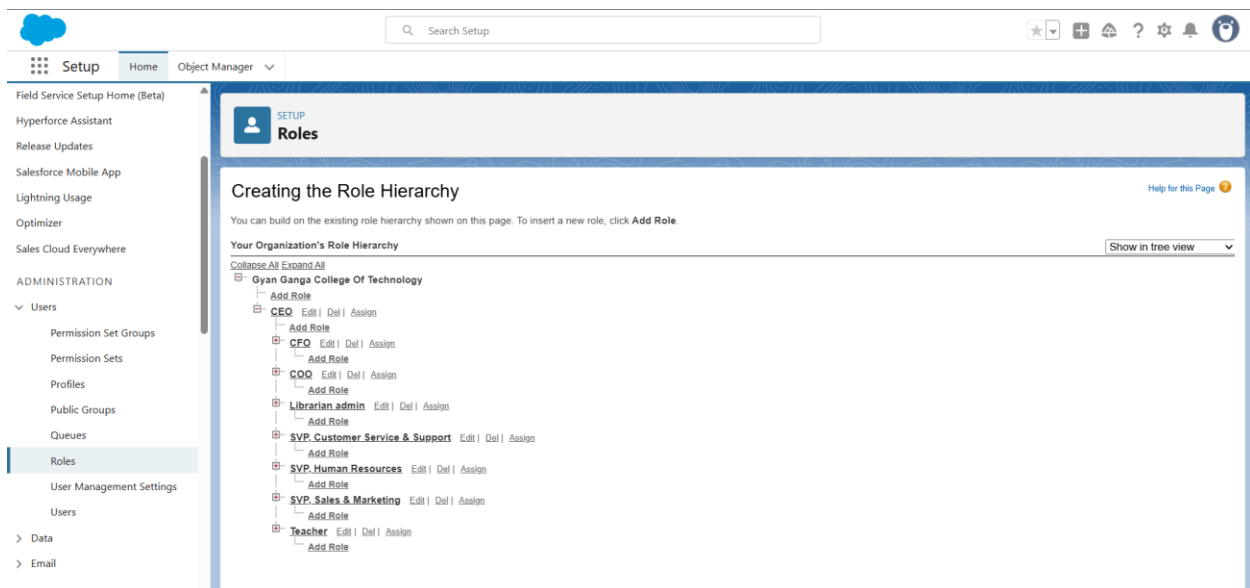
## Librarian Profile



## 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 .

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains a search bar and a list of navigation items under 'Security', including 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The main content area displays a table of sharing settings for various objects.

Object	Sharing Model	Access Level	Checkmark
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Mentor	Private	Private	✓
Mentor	Public Read/Write	Private	✓
Student	Public Read/Write	Private	✓
Student	Controlled by Parent	Controlled by Parent	✓

Other Settings: Manager Groups [1]

## 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.

Setup Home Object Manager

Q Search Setup

Q sharing

Security

Guest User **Sharing** Rule Access Report

**Sharing Settings**

Didn't find what you're looking for? Try using Global Search.

### Sharing Settings

**Work Type Sharing Rules** [New] [Recalculate] [Work Type Sharing Rules Help](#)

No sharing rules specified.

**Work Type Group Sharing Rules** [New] [Recalculate] [Work Type Group Sharing Rules Help](#)

No sharing rules specified.

**Mentor Sharing Rules** [New] [Recalculate] [Mentor Sharing Rules Help](#)

No sharing rules specified.

**Mentor Sharing Rules** [New] [Recalculate] [Mentor Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Mentor: M_Email NOT EQUAL TO	Role: Test Role	Read Only
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Librarian_admin	Role: Librarian_admin	Read/Write
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Teacher	Role: Teacher	Read/Write

**Mentor Sharing Rules** [New] [Recalculate] [Mentor Sharing Rules Help](#)

No sharing rules specified.

**Student Sharing Rules** [New] [Recalculate] [Student Sharing Rules Help](#)

No sharing rules specified.

## Step 9:- Login Access Policy

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

Setup Home Object Manager

Q Search Setup

Q login acc

Security

**Login Access Policies**

Didn't find what you're looking for? Try using Global Search.

### Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

**Manage Support Options** [Save] [Cancel]

**Setting** **Enabled**

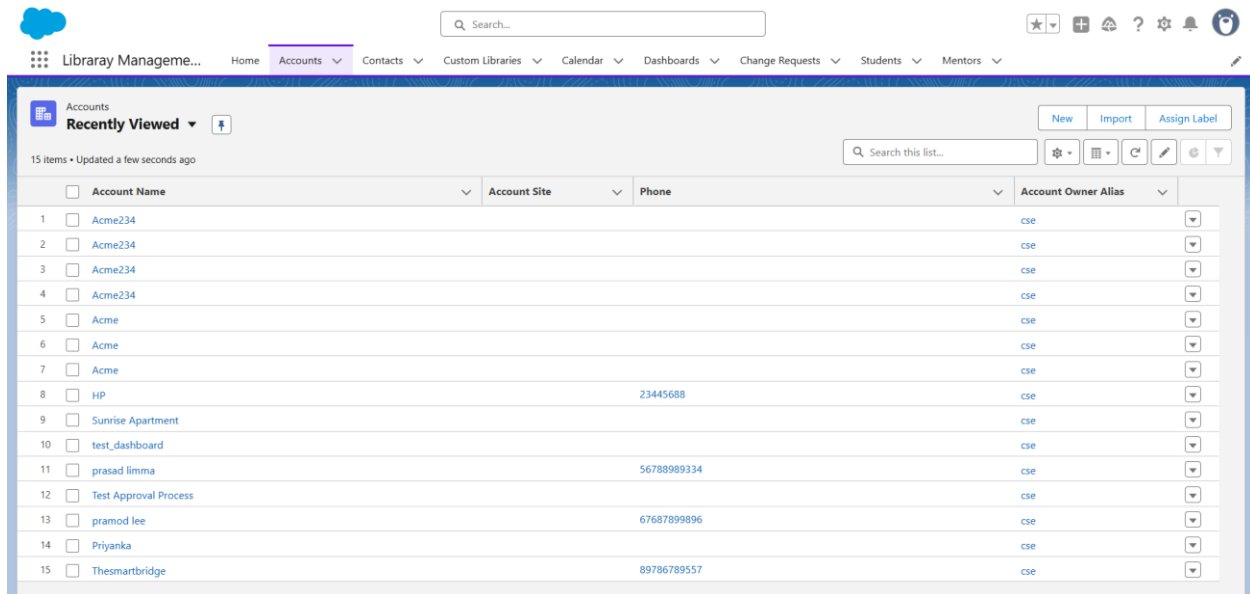
Administrators Can Log in as Any User ☒

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

[Save] [Cancel]

## Step 10 — Library Management Lightning App

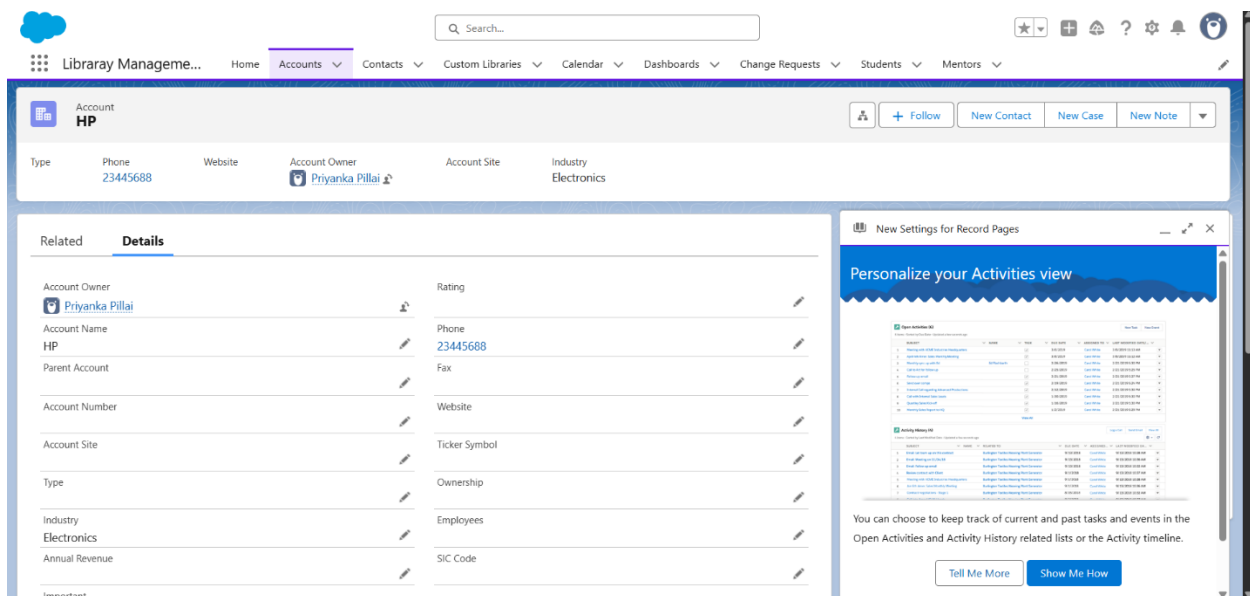
- Setup → App Manager → New Lightning App “Library Management



The screenshot shows the 'Accounts' page in the Library Management Lightning App. The page has a top navigation bar with a search bar and various icons. Below the navigation bar, there's a section for 'Accounts' with a 'Recently Viewed' filter. A table lists 15 accounts with columns for Account Name, Account Site, Phone, and Account Owner Alias. The table is sorted by Account Name in ascending order.

	Account Name	Account Site	Phone	Account Owner Alias
1	Acme234			CSE
2	Acme234			CSE
3	Acme234			CSE
4	Acme234			CSE
5	Acme			CSE
6	Acme			CSE
7	Acme			CSE
8	HP		23445688	CSE
9	Sunrise Apartment			CSE
10	test_dashboard			CSE
11	prasad limma		56788989334	CSE
12	Test Approval Process			CSE
13	pramod lee		67687899896	CSE
14	Priyanka			CSE
15	Thesmartbridge		89786789557	CSE

## Step 11 : - Testing



The screenshot shows the 'Account Details' page for the account 'HP'. The page has a top navigation bar with a search bar and various icons. Below the navigation bar, there's a section for 'Account HP' with buttons for '+ Follow', 'New Contact', 'New Case', and 'New Note'. The account details are displayed in a table with columns for Type, Phone, Website, Account Owner, Account Site, and Industry. The account owner is 'Priyanka Pillai'. Below the account details, there's a 'Related' section with a 'Details' tab. The 'Details' tab shows a list of related accounts with columns for Account Owner, Account Name, Parent Account, Account Number, Account Site, Type, Industry, and Annual Revenue. The account owner is 'Priyanka Pillai'. On the right side of the page, there's a 'New Settings for Record Pages' panel with a 'Personalize your Activities view' section. This section contains a table with columns for Activity Name, Activity Type, Activity Status, Activity Date, and Activity Time. The table lists various activities related to the account. Below the table, there's a message: 'You can choose to keep track of current and past tasks and events in the Open Activities and Activity History related lists or the Activity timeline.' There are two buttons: 'Tell Me More' and 'Show Me How'.

Type	Phone	Website	Account Owner	Account Site	Industry
	23445688		Priyanka Pillai		Electronics

Account Owner	Account Name	Parent Account	Account Number	Account Site	Type	Industry	Annual Revenue
Priyanka Pillai	HP					Electronics	