# Phase 2: Org Setup & Configuration Summary

### 1. Core Company Configuration

The foundational settings for the Salesforce org were established to mirror the environment of the university's departments like placements, clubs, administration into one place -Educonnect PRO.

- **Company Information**: Default time zone (Asia/Kolkata), and locale to ensure all time-stamped data is accurate.
- Business Hours & Fiscal Year: Standard business hours (Mon-SAT, 12 AM - 12 AM) were set to enable future tracking of case/query response times. A standard fiscal year was confirmed for reporting consistency.
- Developer Org: A new Salesforce Developer Edition org was created to serve as the dedicated environment for this project.

## 2. Security Model Implementation

A multi-layered security model was configured to ensure data is accessible only to the appropriate users.

**Profiles:** Five custom profiles were created by cloning the "Standard User" profile:

- 1. **Academic Staff Profile**: For academic staff managing student records and courses.
- 2. Faculty Profile: For faculty members teaching courses.

- 3. **Placement Officer Profile**: For placement team managing job opportunities.
- 4. **Student Community Profile**: For students accessing their academic information
- 5. **Club Coordinator Profile**: For managing student clubs and activities

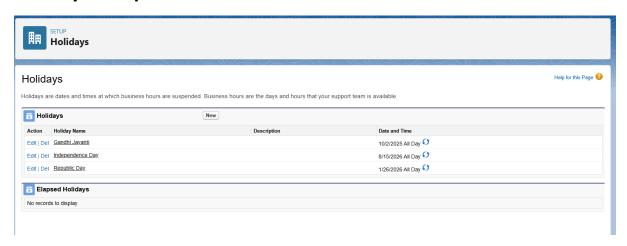
### **Company Profile Setup:**



### **Business Hours Configuration:**

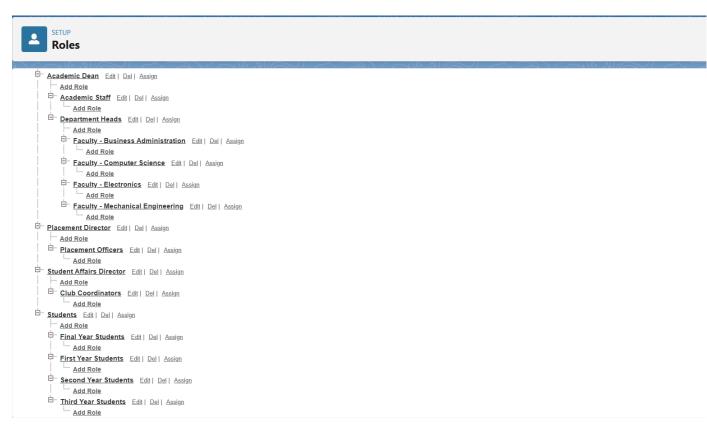
Edit Standard College Hours (GMT+05:30) India Standard Time (Asia/Kolkata)	Edit	Examination Period Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Edit	Standard College Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

#### **Holidays Setup:**



## **Role Hierarchy:**

Five roles were created and this is the role hierarchy.



#### **CREATE USERS:**

☐   Edit Kumar, Dr. Rajesh	dkuma	rajesh.kumar@youruniversity.edu.in	Academic Dean	✓	Standard Platform User
☐   Edit Sharma, Prof. Priya	shar	priya.sharma@youruniversity.edu.in	Faculty - Computer Science	✓	Standard Platform User
☐   Edit Singh, Mr. Amit	msing	amit.singh@youruniversity.edu.in	Placement Officers	1	Standard Platform User

#### **ORGANIZATION-WIDE DEFAULTS (OWD) CONFIGURATION:**

A Private data model was established as the baseline. This is a security best practice, ensuring users can only see their own records by default unless explicitly granted access.

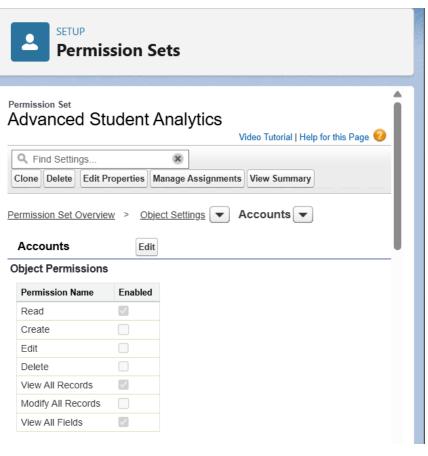
## **Security Model Implemented:**

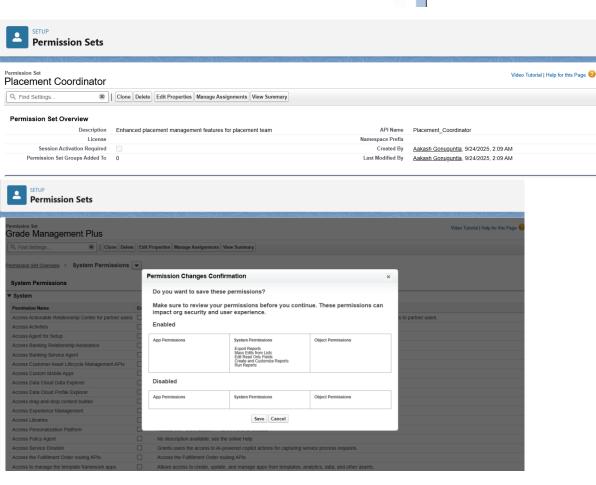
Object	Internal Access	External Access	Controlled by Parent	Reasoning
Account	Public Read Only	Private	No	College/company info should be visible
Contact	Private	Private	Yes	Personal information protection
Case	Private	Private	No	Student support confidentiality
Lead	Private	Private	No	Prospect information security
Opportunity	Private	Private	Yes	Academic opportunity privacy

#### **PERMISSION SETS:**

## Usage Strategy:

- Assigned to senior faculty for advanced grade management
- Analytics permissions for department heads
- Flexible permission enhancement without profile changes





#### **LOGIN ACCESS POLICIES:**

#### **Policy Configuration**:

Login Hours: 06:00 AM - 10:00 PM IST

Time Zone: (GMT+05:30) India Standard Time

IP Restrictions: None (flexible access)

Invalid Login Attempts: 5 attempts

Lockout Period: 15 minutes

Administrator Login: Enabled for troubleshooting

#### **Educational Rationale:**

Extended Hours: Covers early morning and evening study sessions

- Geographic Flexibility: Students access from home, hostels, library
- Security Balance: Protection without accessibility barriers