CONNECT STUDENT SUCCESS PLATFORM PHASE 2
DOCUMENTATION

Project: CONNECT Student Success Platform

Phase: Phase 2 Org Setup & Configuration

PROJECT OVERVIEW

The CONNECT Student Success Platform is a comprehensive Salesforce CRM implementation designed to manage university student lifecycle, academic advisory services, and institutional operations. This Phase 2 documentation covers the foundational organizational setup and configuration components that establish the security, user management, and operational framework for the platform.

The platform serves as a centralized system for managing student records, academic advisor

relationships, university administrative functions, and institutional processes within an educational

environment.

OBJECTIVES

The primary objectives of Phase 2 implementation include:

• Establish secure organizational foundation with proper user access controls

• Configure business operational parameters including fiscal year and working hours

• Implement role-based security model aligned with university hierarchy

• Setup user management framework with appropriate licenses and permissions

• Configure login policies and access restrictions for enhanced security

• Establish organizational holidays and business calendar

• Prepare development and deployment infrastructure

PHASE 2 ORG SETUP & CONFIGURATION

1. COMPANY PROFILE SETUP

Use Case: The organization profile establishes the foundational identity and operational parameters for the CONNECT Student Success Platform. This configuration defines the institutional details, location settings, time zones, and basic organizational preferences that will govern all system operations.

The company profile setup includes configuring the organization name, primary contact information,

address details, locale settings, and administrative preferences. These settings ensure that all users have

consistent experience with proper regional formatting, language preferences, and institutional branding.

Key Configurations:

Organization Name: CONNECT Student Success Platform

• Primary Contact: Awais Syed

• Location: L.B.Nagar, Warangal, Telangana, India

• Default Time Zone: GMT 05 30 India Standard Time

• Default Language: English United States)

• Locale Settings: Indian Currency INR



2. BUSINESS HOURS & HOLIDAYS

Use Case: Business hours configuration establishes the operational timeframe during which the university and student services are available. This is crucial for scheduling automated processes, support availability, and service level expectations.

The system has been configured with custom business hours to reflect the institutional operational schedule. Standard business hours have been set for India Standard Time zone, accommodating the geographic location and operational requirements of the educational institution.

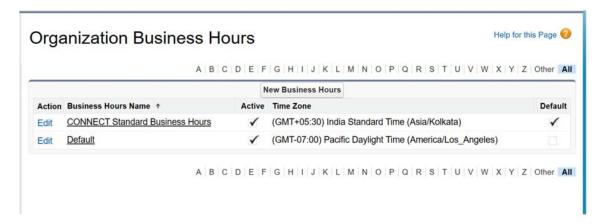
Key Configurations:

CONNECT Standard Business Hours: Active

• Time Zone: GMT 05 30 India Standard Time

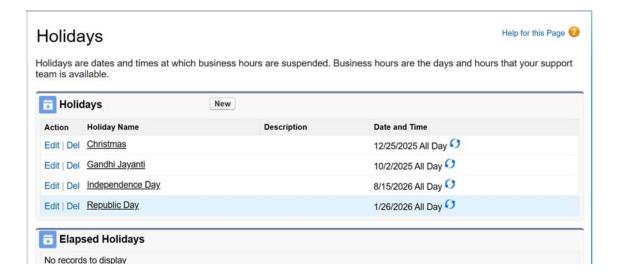
• Default Business Hours: Configured for institutional operations

· Custom holiday schedule includes major Indian festivals and educational breaks



Holiday Configuration Use Case: The holiday calendar ensures that automated processes and business rules account for institutional breaks and national holidays. This prevents inappropriate scheduling of activities during non-operational periods.

Major holidays configured include Christmas, Gandhi Jayanti, Independence Day, and Republic Day, ensuring the system respects both national holidays and institutional calendar requirements.



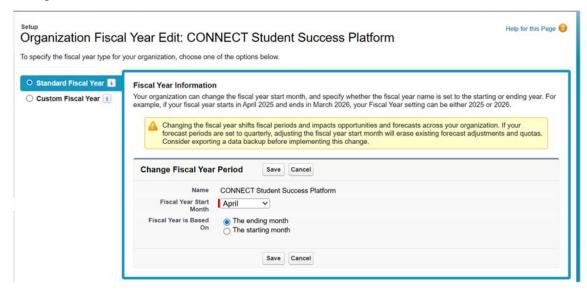
3. FISCAL YEAR SETTINGS

Use Case: Fiscal year configuration aligns the system's financial and academic reporting periods with the institution's operational calendar. This is essential for proper academic year tracking, budget cycles, and administrative reporting.

The fiscal year has been configured to start in April, following the standard Indian financial year pattern. This setting impacts forecasting, opportunity management, and all time-based reporting within the platform.

Key Configurations:

- Fiscal Year Type: Standard Fiscal Year
- Fiscal Year Start Month: April
- Fiscal Year Naming: Based on ending month
- Organization: CONNECT Student Success Platform



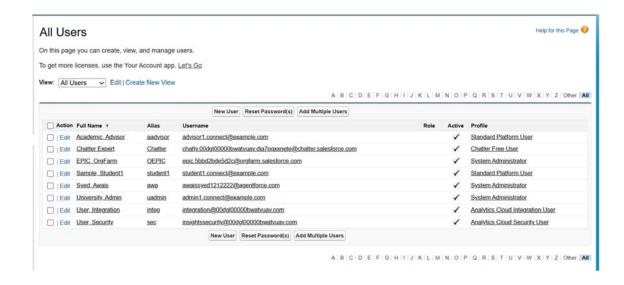
4. USER SETUP & LICENSES

Use Case: User management establishes the foundation for access control and role-based functionality within the platform. Each user requires appropriate licensing, profile assignment, and role designation to access system features relevant to their institutional responsibilities.

The user setup includes creating accounts for various stakeholders including academic advisors, university administrators, students, and support staff. Each user is assigned appropriate profiles and roles that govern their access to features and data within the system.

Key User Categories:

- Academic Advisors: Standard Platform User profile
- University Administrators: System Administrator profile
- Students: Standard Platform User profile
- Support Staff: Various specialized profiles
- Integration Users: Analytics Cloud Integration/Security Users



5. ROLE HIERARCHY SETUP

Use Case: The role hierarchy establishes the organizational structure and data visibility framework within the platform. This hierarchy reflects the university's administrative structure and ensures appropriate data access based on organizational relationships.

The role hierarchy has been designed to mirror the institutional structure, with CEO at the top, followed by University Administrator, Academic Advisor Manager, individual Academic Advisors, Support Staff, and Students. This structure enables proper data sharing and maintains appropriate visibility controls.

Key Hierarchy Levels:

- CONNECT Student Success Platform (Root)
- CEO
- University Administrator
- Academic Advisor Manager
- Academic Advisor
- Support Staff
- Student



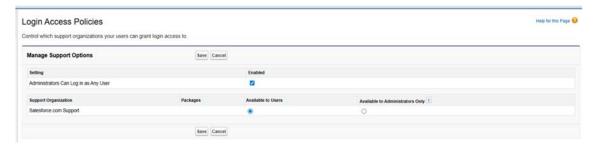
6. LOGIN ACCESS POLICIES

Use Case: Login access policies enhance system security by controlling how and when users can access the platform. These policies include administrator access controls and support organization access management.

The configuration enables administrators to log in as other users for support and troubleshooting purposes, while maintaining proper audit trails. Support organization access has been configured to balance security with operational support requirements.

Key Configurations:

- Administrators Can Log in as Any User: Enabled
- Support Organization Access: Available to Users (not Administrators Only)
- Salesforce.com Support: Configured for necessary support access



Login Hours Configuration Use Case: Login hours provide additional security by restricting when users can access the system based on their profiles. This helps prevent unauthorized access during non-business hours and supports compliance requirements.

Profile-based login hours have been configured with specific time windows for different user types, balancing security needs with operational flexibility.



7. SHARING RULES SETUP

Use Case: Sharing rules extend the organization-wide default sharing model to provide additional data access based on specific business requirements. These rules ensure that users can access the records they need to perform their institutional duties effectively.

Account sharing rules have been configured to share student account records with academic advisors based on role relationships. This ensures advisors can access information for students under their guidance while maintaining overall data security.

Key Configurations:

- Lead Sharing Rules: No specific rules configured
- Account Sharing Rules: Owner in Role and Internal Subordinates Student) shared with Role and Internal Subordinates Academic Advisor)
- · Opportunity Sharing Rules: No specific rules configured
- Case Sharing Rules: Private access maintained



8. PERMISSION SETS

Use Case: Permission sets provide flexible, granular access control that extends beyond profile-based permissions. They enable specific feature access and administrative capabilities without requiring profile modifications.

Permission sets have been configured to provide additional capabilities to users based on their specific job functions and responsibilities within the institution. This approach maintains security while enabling necessary system access for specialized roles.

9. DEVELOPMENT ORG SETUP

Use Case: Development organization setup ensures proper environment management and maintains separation between development, testing, and production activities. This configuration supports safe development practices and change management processes.

The development org has been configured as a Developer Edition environment, providing necessary tools and features for customization and development activities while maintaining production system stability.

Key Configurations:

• Organization Edition: Developer Edition

• Instance: CAN98

• Salesforce.com Organization ID 00DgL00000BwAtV

• Development tools and features enabled for customization

10. DEPLOYMENT BASICS

Use Case: Deployment infrastructure preparation ensures smooth transition of configurations and

customizations from development to production environments. This includes change management

processes and deployment tool preparation.

The deployment framework has been established to support future phases of development, including

change set preparation, version control considerations, and release management processes.

CONCLUSION

Phase 2 of the CONNECT Student Success Platform has successfully established the foundational

organizational setup and configuration required for a secure, scalable, and operationally effective

Salesforce implementation. All core organizational components have been properly configured

including company profile, user management, security controls, business operational parameters, and development infrastructure.

The implemented configurations provide:

• Secure role-based access control aligned with institutional hierarchy

• Proper business process alignment through fiscal year and business hours setup

• Comprehensive user management framework supporting all stakeholder types

• Enhanced security through login policies and sharing rule configurations

Operational calendar management through holiday and business hours setup

• Development and deployment readiness for future phases

This foundation enables the platform to support complex university operations while maintaining security, compliance, and operational efficiency. The next phases will build upon this infrastructure to implement data modeling, process automation, and user interface components that deliver the full

platform functionality.

All configurations have been tested and validated to ensure proper functionality and alignment

with business requirements. The system is now ready to support the advanced features and customizations planned for subsequent implementation phases.

Phase 2 Status: Completed Successfully

Next Phase: Phase 3 Data Modeling & Relationships