

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

Company Information

CONNECT Student Success Platform

Help for this Page

The organization's profile is below.

[User Licenses \(10+\)](#) |
 [Permission Set Licenses \(10+\)](#) |
 [Feature Licenses \(11\)](#) |
 [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	CONNECT Student Success Platform	Phone	
Primary Contact	Awais Syed	Fax	
Division		Default Locale	English (United States)
Address	L B Nagar Warangal 506002 Telangana India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	39 (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	00DgL00000BwAIV
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 9/17/2025, 7:57 AM	Modified By	Awais Syed, 9/21/2025, 11:12 PM

Edit

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

Organization Business Hours

Help for this Page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Business Hours

Action	Business Hours Name	Active	Time Zone	Default
Edit	CONNECT Standard Business Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	✓
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

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.

Holidays

Help for this Page

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

Action	Holiday Name	Description	Date and Time
Edit Del	Christmas		12/25/2025 All Day
Edit Del	Gandhi Jayanti		10/2/2025 All Day
Edit Del	Independence Day		8/15/2026 All Day
Edit Del	Republic Day		1/26/2026 All Day

Elapsed Holidays

No records to display

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

Setup

Organization Fiscal Year Edit: CONNECT Student Success Platform

To specify the fiscal year type for your organization, choose one of the options below.

☒ Standard Fiscal Year ⓘ

☐ Custom Fiscal Year ⓘ

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period Save Cancel

Name CONNECT Student Success Platform

Fiscal Year Start Month April

Fiscal Year is Based On

☒ The ending month

☐ The starting month

Save Cancel

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

All Users Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Academic Advisor	aadvisor	advisor1.connect@example.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl00000bwa7uav.dia7rcoomete@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.5bbd2bde5d2c@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Sample_Student1	student1	student1.connect@example.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Syed_Awais	awa	awaissyed1212222@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	University_Admin	uadmin	admin1.connect@example.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl00000bwa7uav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl00000bwa7uav.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

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

Creating the Role Hierarchy Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy Show in tree view

[Collapse All](#) [Expand All](#)

- CONNECT Student Success Platform
 - Add Role
 - CEO
 - Add Role
 - University Administrator
 - Add Role
 - Academic Advisor Manager
 - Add Role
 - Academic Advisor
 - Add Role
 - Support Staff
 - Add Role
 - Student
 - Add Role

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

The screenshot shows the 'Login Access Policies' configuration page. At the top, it says 'Control which support organizations your users can grant login access to.' Below this is a 'Manage Support Options' section with 'Save' and 'Cancel' buttons. The configuration is divided into two main sections: 'Setting' and 'Support Organization'. In the 'Setting' section, 'Administrators Can Log in as Any User' is set to 'Enabled' with a checkbox. In the 'Support Organization' section, 'Salesforce.com Support' is listed under 'Packages'. The 'Available to Users' checkbox is checked, and the 'Available to Administrators Only' checkbox is unchecked. There are 'Save' and 'Cancel' buttons at the bottom of the configuration area.

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.

The screenshot shows the 'Login Hours' configuration table. It has columns for 'Day', 'Start Time', and 'End Time'. The table lists login hours for each day of the week. For Sunday and Saturday, the login hours are 'All Day'. For Monday through Friday, the login hours are from 6:30 PM PDT to 7:30 AM PDT. There are 'Edit' and 'Delete' buttons at the top right of the table, and a 'Login Hours Help' link.

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	6:30 PM PDT	7:30 AM PDT
Tuesday	6:30 PM PDT	7:30 AM PDT
Wednesday	6:30 PM PDT	7:30 AM PDT
Thursday	6:30 PM PDT	7:30 AM PDT
Friday	6:30 PM PDT	7:30 AM PDT
Saturday	All Day	All Day

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

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit Del	Owner in Role and Internal Subordinates: Student	Role and Internal Subordinates: Academic Advisor	Read Only	Private	Private

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