

Phase 2: Org Setup & Configuration - Completion Report

Project: **STUDENT COURSE ENROLLMENT & ATTENDANCE TRACKER**

Institute: Prof. Ram Meghe Institute of Technology & Research

1. Salesforce Edition

- Developer Org used for implementation.

2. Company Profile Setup

- Organization Name: Prof. Ram Meghe Institute of Technology & Research
- Default Locale: English (India)
- Default Currency: INR
- Default Time Zone: (GMT+05:30) India Standard Time

➡ Process Flow: Setup → Company Information → Edit Company Profile

The screenshot shows the 'Company Information' page in the Salesforce setup. The page title is 'Company Information' under the 'SETUP' tab. It displays the organization's profile with various settings and metrics. Key details include:

Organization Detail		Edit	
Organization Name	Prof. Ram Meghe Institute of Technology & Research	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	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	449 KB (9%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	2 (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	000gK000007Zu1j
		Organization Edition	Developer Edition
		Instance	CAN96

At the bottom, it shows 'Created By' as 'OrgFarm EPIC' on 7/17/2025, 9:17 AM and 'Modified By' as 'Harshal Alaspure' on 9/15/2025, 5:46 AM.

3. Business Hours & Holidays

- Business Hours: "School Hours" (All days, 09:00 AM – 05:00 PM)
- Holidays: Configurable (none added yet).

➡ Process Flow: Setup → Company Settings → Business Hours → Define & Assign

The screenshot shows the 'Business Hours' setup page. At the top, there is a note: 'If you enter blank business hours for a day, that means your organization does not operate on that day.' The main area is divided into three steps:

- Step 1. Business Hours Name:** Shows 'Business Hours Name' set to 'School Hours', with an 'Active' checkbox checked.
- Step 2. Time Zone:** Shows 'Time Zone' set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'.
- Step 3. Business Hours:** Shows daily business hours from 9:00 AM to 5:00 PM for all days of the week, with a '24 hours' checkbox checked for each day.

At the bottom are 'Save' and 'Cancel' buttons.

4. Fiscal Year Settings

- Fiscal Year: Custom, 01-Apr-2025 to 31-Mar-2026

➡ Process Flow: Setup → Company Settings → Fiscal Year → Custom Fiscal Year

The screenshot shows the 'Custom Fiscal Year Definition' page. At the top, there is a note: 'This page allows you to define a custom fiscal year record. Dates for the custom fiscal year will be generated based on the choices you make below. If you need to customize your fiscal year, expand the Advanced Customization section.' The main area is divided into sections:

- Fiscal Year Information:** Fields include 'Fiscal Year Start Date' (4/1/2025), 'Fiscal Year Name' (2026), 'Description' (empty), and 'Week Start Day' (Tuesday).
- Reset Fiscal Year Structure:** A link to reset the fiscal year structure.

At the bottom are 'Preview', 'Save', and 'Cancel' buttons.

5. User Setup & Licenses

- Teacher User: License = Salesforce, Profile = Teacher_Profile, Role = Teacher
- Student User: License = Salesforce, Profile = Student_Profile, Role = Student
- Guardian User: License = Salesforce, Profile = Guardian_Profile, Role = Guardian

→ Process Flow: Setup → Users → New User → Assign License & Profile

New User

User Edit Save Save & New Cancel

General Information

First Name: Anita Role: Teacher

Last Name: Deshmukh User License: Salesforce

Alias: adesh Profile: --None--

Email: Active:

Username: Marketing User:

Nickname: Offline User:

Title: Knowledge User:

Company: Flow User:

Department: Service Cloud User:

Division: Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

Help for this Page

! Required Information

6. Roles Hierarchy

- Academic_Admin → Teacher → Student
- Guardian under Admin

→ Process Flow: Setup → Roles → Define Hierarchy → Assign Users

Creating the Role Hierarchy

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

Collapse All Expand All

- Prof. Ram Meghe Institute of Technology & Research
 - Add Role
 - Academic_Admin [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Guardian [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Teacher [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Student [Edit](#) | [Del](#) | [Assign](#)
 - Add Role

Show in tree view

7. Profiles

- Teacher_Profile (cloned and customized from Standard User)
- Student_Profile (cloned and customized from Standard User)
- Guardian_Profile (cloned and customized from Standard User)

→ Process Flow: Setup → Profiles → Clone Standard Profile → Customize Permissions

The screenshot shows the 'Clone Profile' screen in the Salesforce Setup. At the top, there's a message: 'You must select an existing profile to clone from.' Below this, there are fields for 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (containing 'Teacher_Profile'). At the bottom right are 'Save' and 'Cancel' buttons.

8. Permission Sets

- PS_Grade_Manager → grants extra edit rights on Grade_c, assigned to Teacher user (Anita).
- PS_Attendance_Manager → grants rights to manage Attendance_c, assigned to Teacher user (Anita).

→ Process Flow: Setup → Permission Sets → Create → Assign to User

The screenshot shows the 'Permission Sets' screen in the Salesforce Setup. At the top, it says 'On this page you can create, view, and manage permission sets.' Below this is a toolbar with 'All Permission Sets' dropdown, 'Edit | Delete | Create New View', and a search icon. A table lists permission sets: PS_Attendance_Manager and PS_Grade_Manager. The PS_Grade_Manager row has a note: 'Allows teachers to create/edit/delete Grade_c records'. At the bottom right are 'New' and 'Edit' buttons.

9. Organization-Wide Defaults (OWD)

- Student_c = Private
- Guardian_c = Private
- Attendance_c = Private
- Grade_c = Private
- Course_c = Public Read Only

➡ Process Flow: Setup → Sharing Settings → Define OWD

The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab. It lists various objects and their sharing defaults. Most objects have 'Private' selected, except for 'Tableau Host Mapping' which is set to 'Public Read Only'. Under 'Other Settings', 'Standard Report Visibility' is checked, while 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields' are unchecked.

Object	Sharing Default	Access Control
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Presence	Public Read Only	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
Attendance	Private	Private
Course	Public Read Only	Private
Grade	Private	Private
Guardian	Private	Private
Student	Private	Private

10. Sharing Rules

- Grades (Grade_c): Shared with Guardian role.
- Attendance (Attendance_c): Shared with Guardian role if needed.
- Assignments: Shared with Teacher role.

➡ Process Flow: Setup → Sharing Settings → New Sharing Rule → Define Access

The screenshot shows the 'Sharing Settings' page in Salesforce. At the top, there's a 'SETUP' button and a 'Sharing Settings' header. Below the header, a 'Setup' link and the title 'Attendance Sharing Rule' are displayed. A note says: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.' It also notes: 'Note: "Roles and subordinates" includes all users in a role, and the roles below that role.' A note further states: 'You can use sharing rules only to grant wider access to data, not to restrict access.' The main form contains the following fields:

Label	Share_Attendance_to_Gua
Rule Name	Share_Attendance_to_Gua
Description	(empty)
Attendance: owned by members of	Role: Student
Share with	Role: Guardian
Access Level	Read Only
Created By	Harshal Alaspure, 9/15/2025, 6:37 AM

At the bottom right of the form are 'Save' and 'Cancel' buttons. On the far right of the page, there's a 'Help for this Page' link.

Outcomes of Phase 2:

- Developer Org successfully configured.
- Company academic information standardized.
- Academic roles, profiles, and permission sets created and assigned.
- OWD and Sharing Rules enforced for record-level security.
- Teachers and Guardians now have proper controlled access to Assignments, Attendance, and Grades.
- Phase 2 deliverables completed. Ready to proceed to Phase 3: Data Modeling & Relationships.