

# University Student Management — Phase 2: Org Setup & Configuration

## 1. Introduction

This phase covers setting up a Salesforce Developer Org to simulate a University/School environment for student enrollment, course management, and staff coordination.

## 2. Objectives

3. Configure a clean Salesforce Developer Org named “**university school**”.
4. Create sample users (University Admin, Teacher, Student, Registrar).
5. Secure data using **Organization-Wide Defaults (OWD)** and sharing rules.
6. Demonstrate **student enrollment, course assignments, and cross-role data visibility.**

## 7. Configuration Steps

### Step 0 — Company Info

- Signed up for **Salesforce Developer Edition** and logged in.
- Setup → **Company Information** → updated:
- **Organization Name** = Pragati College
- **Locale** = English (India)
- **Timezone** = IST

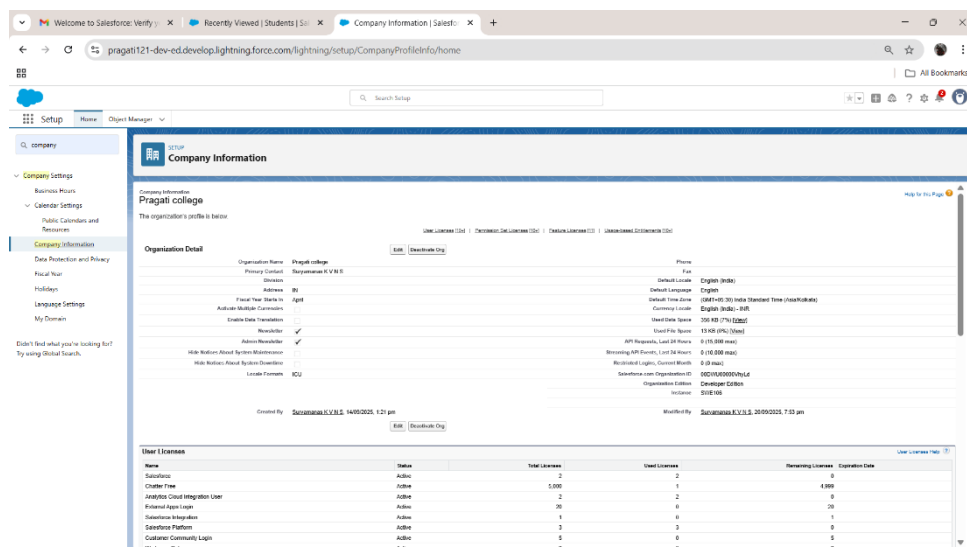


Fig.1 CompanyInfo

## Step 1 — Business Hours & Holidays

❓ Created “University Business Hours”: Mon–Fri 9 AM–5 PM.

❓ Added relevant Holidays (e.g., national holidays, semester breaks) and linked them to the Business Hours.

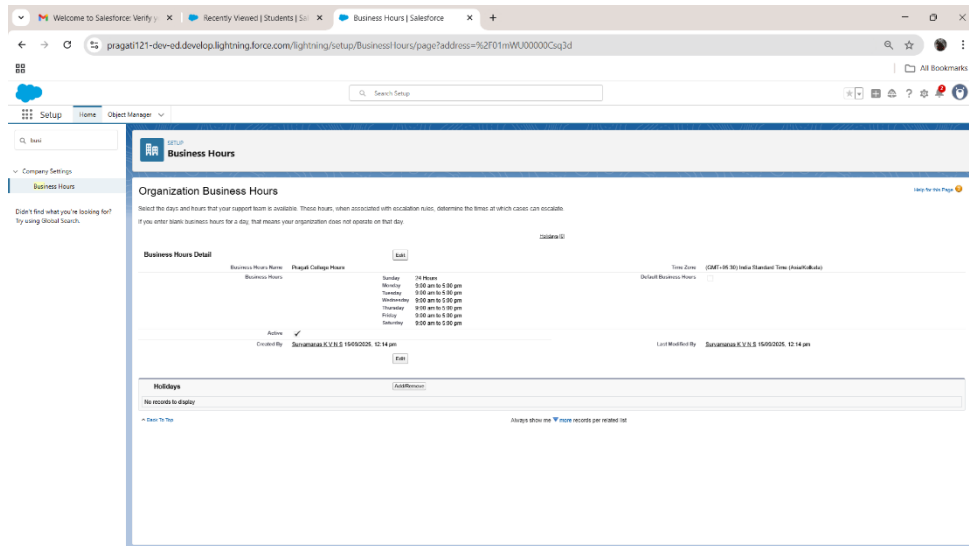


Fig.2 BusinessHours

## Step 2 — Users

- Created 3 sample users:

Display Name	Username (example)	Profile	Role
John Dean	<a href="mailto:dean124@pragati.edu">dean124@pragati.edu</a>	Dean	Dean
Dr. Amy Wy	<a href="mailto:professor.wu1258@pragati.edu">professor.wu1258@pragati.edu</a>	Faculty	Faculty
John Smith	<a href="mailto:student.john12584@pragati.edu">student.john12584@pragati.edu</a>	Student	Student

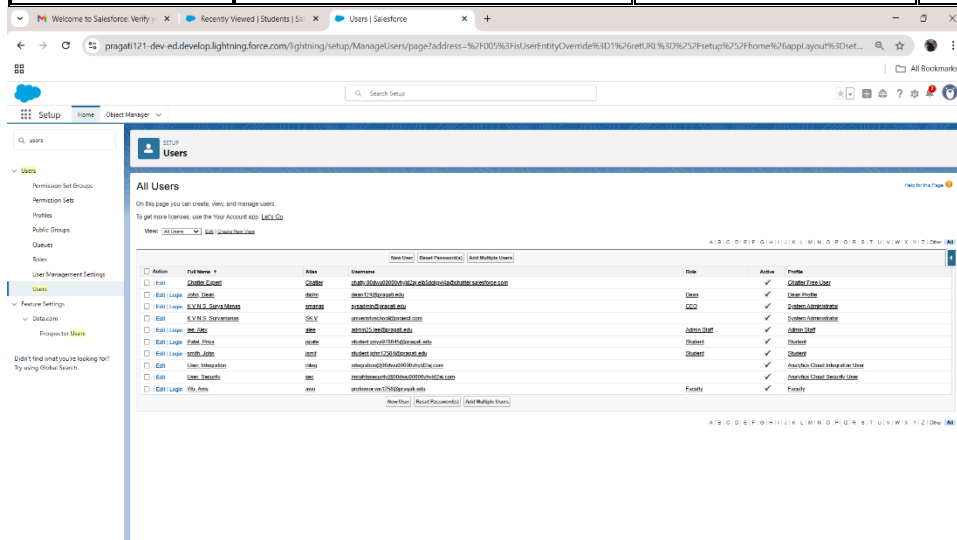


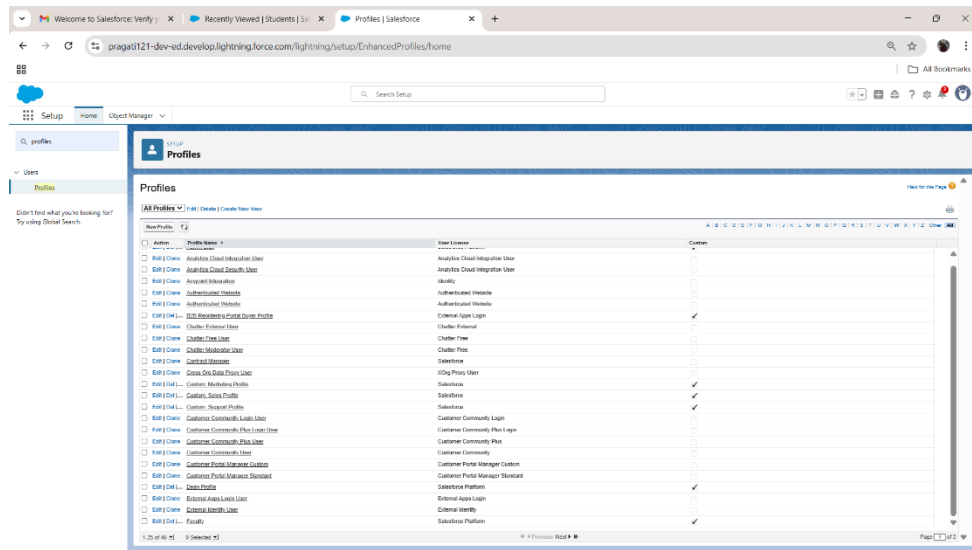
Fig.3 Users\_List

### Step 3 — Profiles

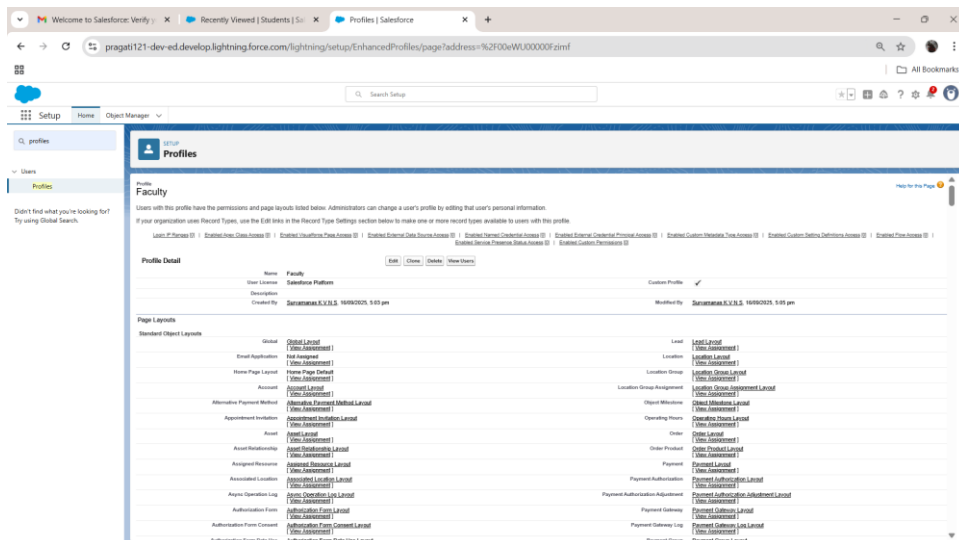
- **Cloned Standard User → created Teacher profile.**
- **Cloned Standard User → created Student profile.**
- **Cloned Standard User → created Registrar profile.**

### Adjusted Object Permissions:

- **Course\_\_c:**
  - Teacher = Read/Create/Edit
  - Registrar = Read/Create/Edit
  - Student = Read Only (for enrolled courses)
- **Enrollment\_\_c:**
  - Teacher = Read/Edit/Create (for students in their courses)
  - Registrar = Read/Edit/Create (for all students)
  - Student = Read Only (own enrollments)
- **Student\_\_c (Contacts/Profiles):**
  - Teacher = Read/Edit (for students in their courses)
  - Registrar = Read/Edit (all students)
  - Student = Read/Edit (own record)



### Fig.4 profile



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## Step 4 — Role Hierarchy

- Created simple hierarchy:
- **Chancellor** is at the top.
- **Admin Staff** reports to Chancellor.
- **Dean** reports to Admin Staff.
- **Faculty** reports to Dean.
- **Student** reports to Faculty.

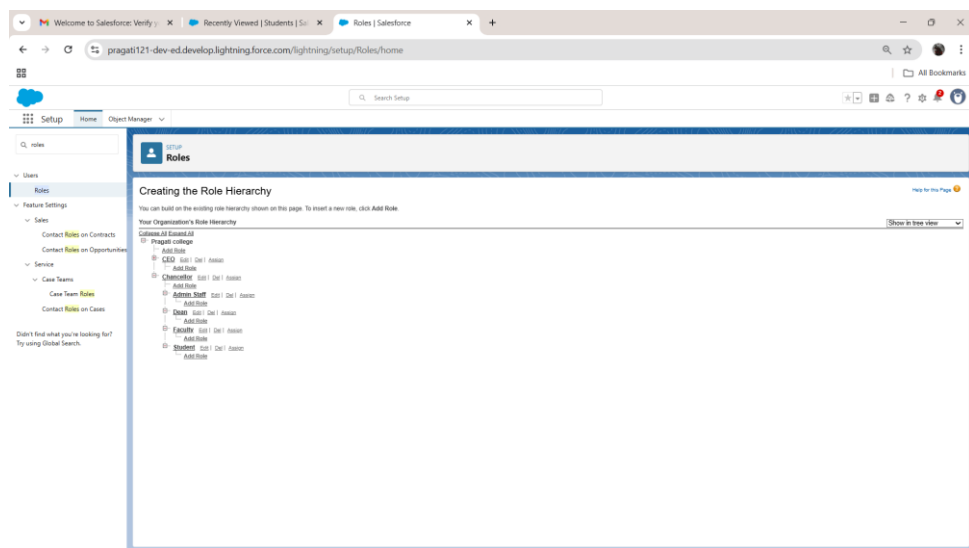


Fig.6 Roles

## Step 5 — Org-Wide Defaults (OWD)

🔗 Navigate to **Setup → Sharing Settings**.

🔗 Set baseline access for objects:

- **Student\_\_c** = Private
- **Course\_\_c** = Public Read Only (or Read/Write if needed)
- **Enrollment\_\_c** = Private
- **Grade\_\_c** = Private

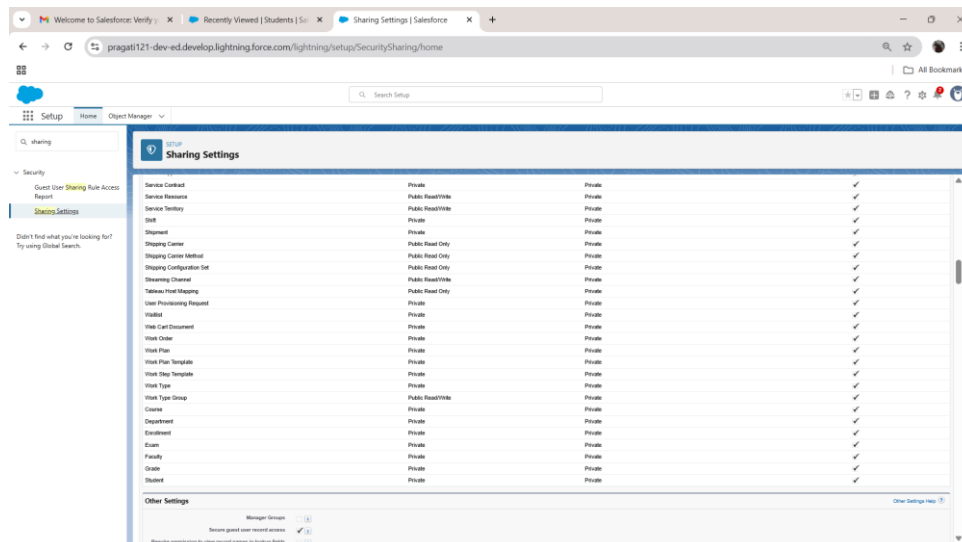


Fig.7 SharingSettings\_OWD

## Step 6 — Sharing Rule (Receptionist ↔ Doctor access)

❓ Created Public Group “Teachers” containing all Teacher users.

❓ Created Owner-based sharing rule:

- **Owned by:** Registrar
- **Share with:** Teachers group
- **Access Level:** Read/Write

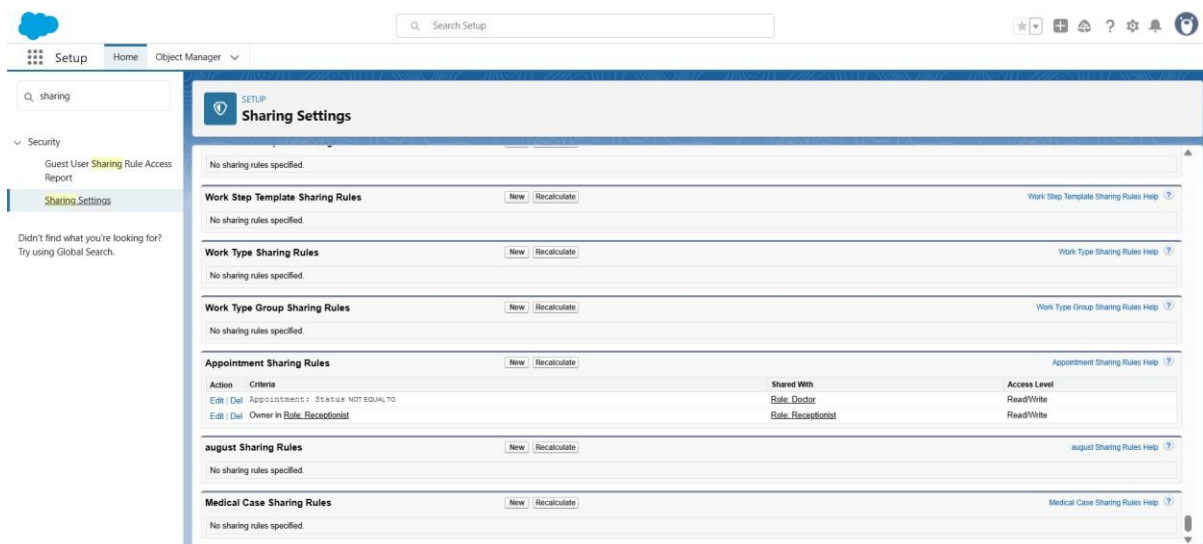


Fig.8 SharingRule

## Step 7 — Login Access Policy

- Enabled “Administrators Can Log in as Any User.”

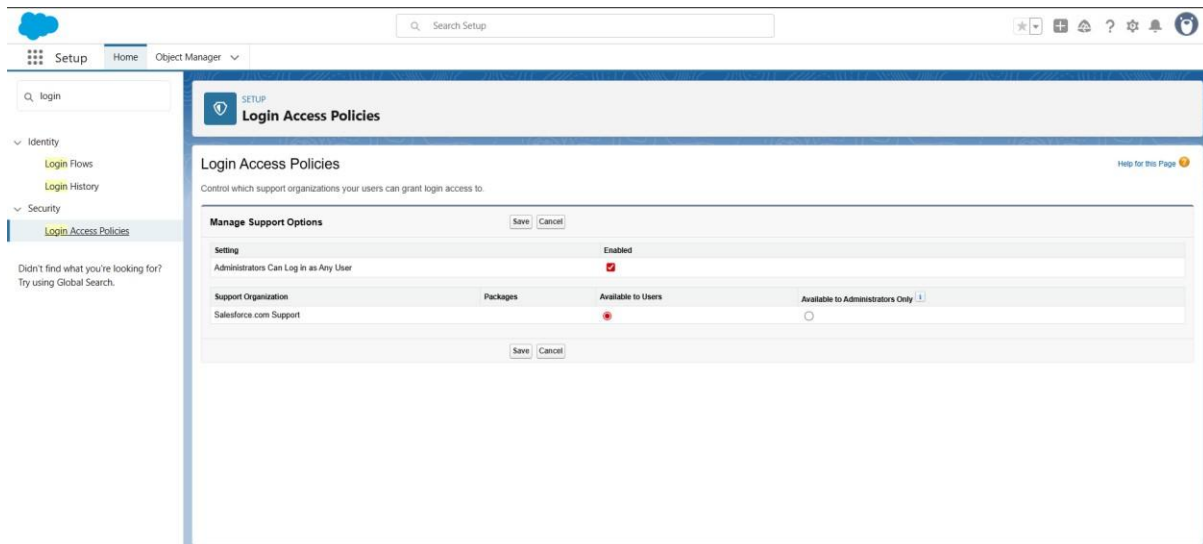


Fig.9 LoginAccess

## Step 8 — Student Lightning App

Navigate to **Setup → App Manager → New Lightning App**.

App Name: **“EduConnect University Management”**

Added tabs:

- **Students (Student\_\_c)**
- **Courses (Course\_\_c)**
- **Enrollments (Enrollment\_\_c)**
- **Grades (Grade\_\_c)**
- **Reports**
- **Dashboards**

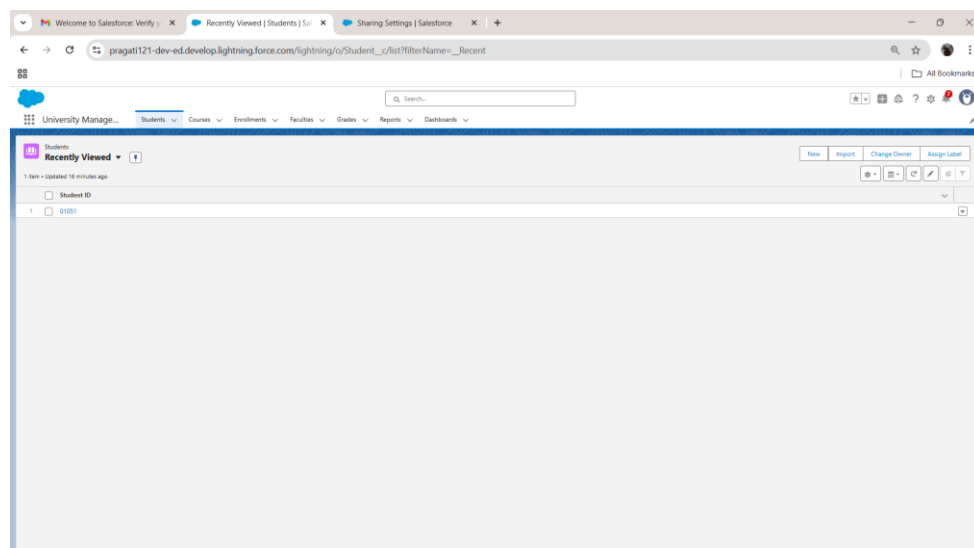


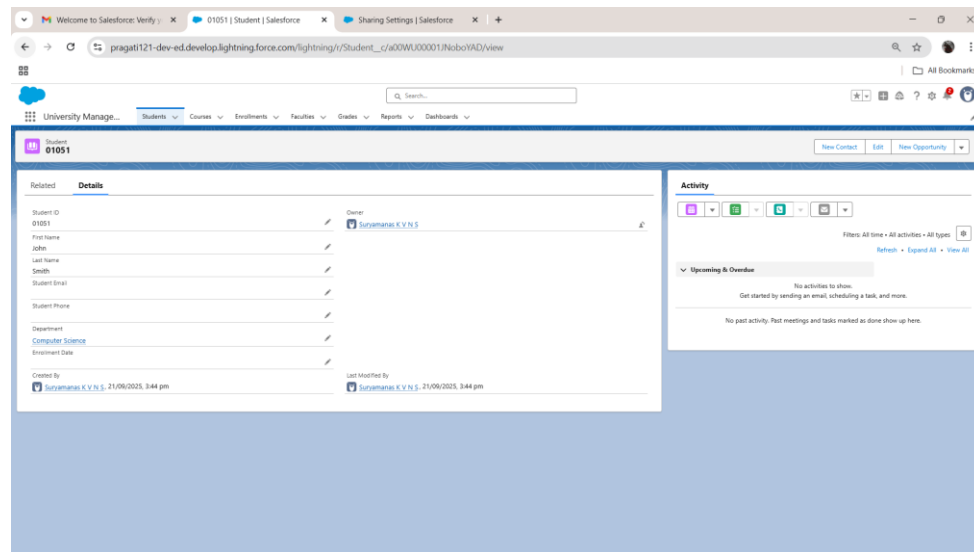
Fig.10 AppManager

## Step 9 — Testing

🔍 **Logged in as Registrar** → created an **Enrollment** for Student 01051 in a course.

🔍 **Logged in as Teacher (using Login-As)** → verified the Teacher can **view & edit the Enrollment and Grades** for their courses.

- ❓ **Logged in as Student 01051** → verified they can **view their own courses and grades** only.
- ❓ **Verified OWD & sharing rules** restrict other users from accessing Student 01051's record.



**Fig.11 Testing (Student's view detail page)**

## 8. Results / Observations

- Registrar can create **Enrollments** and still edit them.
- Teachers automatically gain **Read/Write access** to student enrollments and grades via sharing rule.
- University Admin sees **all records** across Students, Courses, Enrollments, and Grades.
- OWD set to **Private** ensures a **secure baseline** for all student and course data.
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## 9. Next Steps (Optional Enhancements)

- Add **email/SMS reminders** for upcoming classes, assignment deadlines, or grade postings via **Flow**.
- Add **Dashboards and Reports** for student performance analytics, course completion, and enrollment trends.
- Add **additional record types** for exams, assignments, or online submissions, including **file uploads** for assignments and project submissions.