Student Success Hub - College Application & Mentorship System

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand the requirements, users, and workflows of the Student Success Hub and plan the Salesforce implementation that will later support applications, mentorship sessions, and reporting.

1. Requirement Gathering

- **Talk to Stakeholders:**
  - **Program Administrator:** Manages students, mentors, applications, sessions, and reports.
  - **Mentors:** Volunteer guidance providers; schedule sessions and track student progress.
  - **Students:** High school participants submitting college applications.

- **Example Requirements:**
  - Track all students with details like name, high school, GPA, and assigned mentor.
  - Track all mentors and link them to multiple students.
  - Track each college application for a student with the target university and application status.
  - Log mentorship sessions with date, time, and notes.
  - Avoid errors in application submission (e.g., ensure essays are completed before marking as submitted).
  - Generate reports and dashboards showing student progress, mentor sessions, and application statistics.

2. Stakeholder Analysis

- **Program Administrator**: Set up the system, assign mentors, track applications, and generate reports
- **Mentor**: Guide students, schedule, and log mentorship sessions
- **Student:** Submit applications, attend sessions, track progress

3. Business Process Mapping

- **Student Application & Mentorship Flow:**
  - Student creates or updates college applications.
  - Program Administrator assigns a mentor.
  - Mentor schedules and conducts mentorship sessions.
  - Progress is tracked (essays completed, applications submitted).
  - Administrators generate reports to monitor overall program progress.

4. Industry-Specific Use Case Analysis

- **Non-profit education:**
  - Difficulty tracking multiple students and mentors.
  - Limited real-time visibility into application status.
  - Challenges in managing mentorship schedules efficiently.
- **Salesforce app requirements:**
  - Centralized student and mentor database.
  - Application and session tracking with validation rules.
  - Reporting and dashboards for monitoring metrics.

5. AppExchange Exploration

- Research existing apps for student or mentorship tracking.
- Many exist but are generic or complex.
- The project will build a custom, simpler solution tailored for Future Scholars, which provides learning in Salesforce setup, data modeling, and basic automation.

6. Additional Insights for Phase 1

- Define custom objects and fields: student, Mentor, Application, Mentorship Session.
- Plan relationships (Master-Detail and Lookup).
- Prepare sample data for testing workflows.
- Plan validation rules and picklist values for later automation.
- Identify basic reporting needs and metrics for dashboards.

Phase 2: Org Setup & Configuration

Goal: Prepare the Salesforce environment to support the Student Success Hub app, ensuring proper user access, security, and working conditions for Mentors and Managers.

1. Salesforce Edition

- Use Developer Edition (Dev Org) — a free Salesforce org for building and testing the project.

2. Company Profile Setup

- Navigate to Setup → Company Settings → Company Information.
- Fill in:
    - Company Name: Future Scholars
    - Time Zone: IST (or as per your location)
    - Currency: INR or USD, depending on the project
- These settings ensure accurate timestamps and currency for applications and mentorship sessions.

3. Business Hours & Holidays

- Go to Setup → Business Hours → create “Future Scholars Working Hours”:
- Monday to Friday: 09:00 AM – 06:00 PM
- Saturday and Sunday: Closed (optional)
- Go to Setup → Holidays → add public holidays.
- This ensures sessions and approvals occur only during working hours.

4. Fiscal Year

- Use Standard Fiscal Year (Jan–Dec) to maintain consistent reporting.

5. User Setup

- Create users under Setup → Users → Users → New User
    - **User**
        - Mentor 1
        - Manager 1
    - **Role**
        - Mentor
        - Manager

- **Profile**
  - Mentor Profile
  - Manager Profile

6. Profiles

- **Mentor Profile:**
  - Access: Student, Application, Mentorship Session (Read/Create/Edit their assigned records)
  - No access to sharing rules, reports by default
  - Login Hours: 09:00 AM – 06:00 PM, Mon–Fri

- **Manager Profile:**
  - Full access to all objects, reports, and dashboards
  - Unrestricted login hours

7. Roles

- Create hierarchy under Setup → Roles → Set Up Roles:
  - Manager (Top)
    └─ Mentor (Below)

- Roles ensure proper record visibility based on hierarchy.

8. Permission Sets

- Create Reports Access under Setup → Permission Sets → New

  - Label: Reports Access
  - Description: "Allows mentors to access reports and dashboards"
  - License: None

- Enable permissions: Run Reports, View Dashboards
- Assign only to mentors who require reporting access

9. Org-Wide Defaults (OWD)

- **Student__c** → Public Read Only
- **Application__c** → Private (only owner + manager)
- **Mentorship_Session__c** → Private

10. Sharing Rules

- This allows mentors to view applications assigned to their program.

11. Login Access Policies

- Restrict mentors to login only 09:00 AM – 06:00 PM, Mon–Fri.
- Managers have unrestricted login hours.