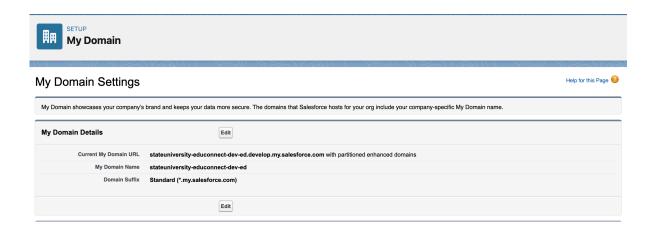
Phase 2: Org Setup & Configuration

1. Salesforce Edition Selection & Justification

1.1 Recommended Edition: Enterprise Edition

Justification:

- Advanced Workflow & Process Builder: Required for complex student intervention workflows
- Advanced Sharing & Security: Need granular control for FERPA compliance
- API Access: Essential for LMS, SIS, and payment gateway integrations
- Custom Report Types: Required for complex academic reporting
- Sandboxes: Critical for testing academic year transitions
- Storage: 1GB base + 20MB per user (sufficient for 25,000+ students)



2. Company Profile Setup

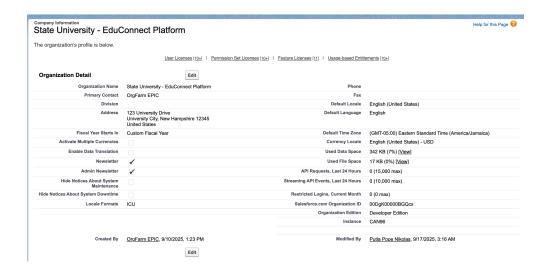
2.1 Organization Information

Navigate to: Setup → Company Information → Company Information

2.2 Critical Settings Configuration

Default Language: English **Default Locale:** English (United States)

Default Time Zone: America/New_York (adjust based on university location)



3. Business Hours & Holiday Configuration

3.1 Academic Calendar Business Hours

Setup Path: Setup \rightarrow Business Hours \rightarrow New Business Hours

Academic Support Hours (Primary):

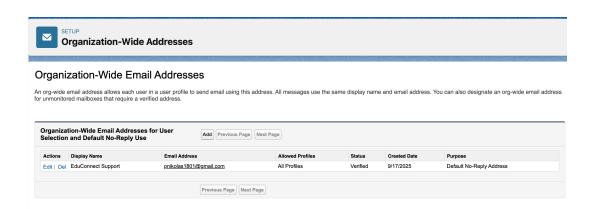
Emergency Support Hours:

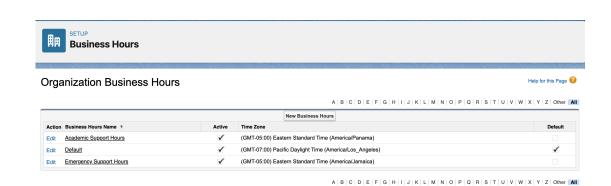
Career Services Hours:

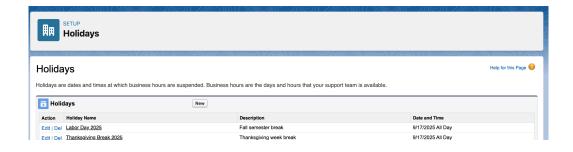
3.2 Holiday Configuration

Setup Path: Setup → Business Hours → Holidays**

Academic Year Holidays 2024-2025:







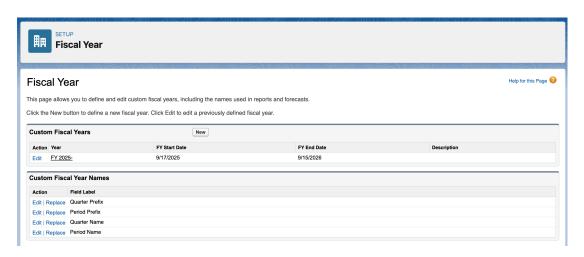
4. Fiscal Year Settings

4.1 University Fiscal Year Setup

Path: Setup → Company Information → Fiscal Year

Impact on EduConnect:

- Financial aid disbursement tracking
- Alumni giving campaign periods
- Academic performance reporting cycles
- · Budget planning and forecasting



5. User Setup & License Management

5.1 User Categories & License Assignment

Administrative Users (Enterprise Licenses):

Academic Staff (Enterprise Licenses):

Faculty (Platform Licenses):

Support Staff (Enterprise Licenses):

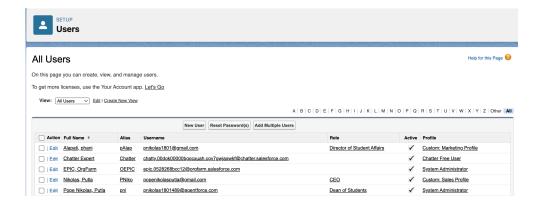
5.2 User Management Best Practices

Security Requirements:

- Password complexity: 8+ characters with mixed case, numbers, symbols
- Password expiration: 90 days
- Login hours: Restricted to business hours (except emergency support)
- Two-factor authentication: Required for all administrative users

User Lifecycle Management:

- New employee onboarding workflow
- Role change approval process



6. Profile Configuration

6.1 Standard Profile Modifications

System Administrator Profile:

- Reserved for IT team only (5 users maximum)
- Full access to all objects and system functions
- No restrictions on login hours or IP ranges

6.2 Custom Profile Creation

Profile 1: University Executive

Profile 2: Academic Advisor

Profile 3: Career Services Counselor

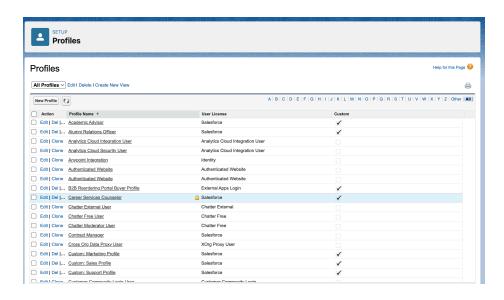
Profile 4: Alumni Relations Officer

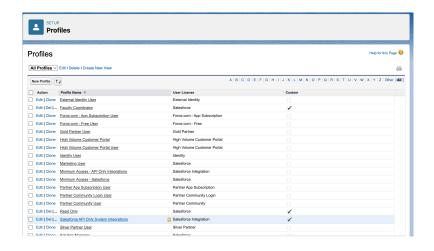
Profile 5: Faculty Coordinator

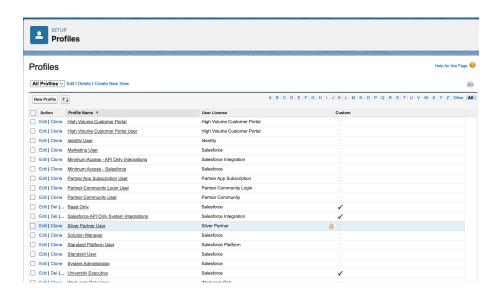
6.3 Permission Set Strategy

Why Permission Sets for EduConnect:

- Flexible access management across departments
- Temporary access grants (e.g., during registration periods)
- Cross-functional project access
- Compliance with principle of least privilege

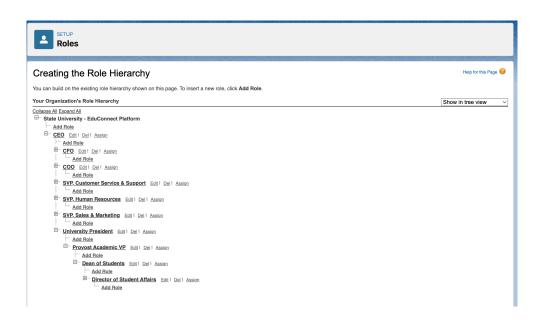






7. Role Hierarchy Configuration

7.1 EduConnect Role Hierarchy Design



8. Organization-Wide Defaults (OWD)

8.1 Security Model Strategy

EduConnect follows a "Restrictive by Default" approach due to FERPA requirements:

9. Sharing Rules Configuration

9.1 Criteria-Based Sharing Rules

Rule 1: Student Academic Support Sharing

Rule 2: Alumni by Graduation Year

Rule 3: Career Services by Program

9.2 Owner-Based Sharing Rules

Rule 1: Cross-Department Case Collaboration

9.3 Public Groups Configuration

Public Group: Academic Support Team Public Group: Alumni Engagement Team

10. Login Access Policies

10.1 IP Range Restrictions

Administrative Users:

General Users:

10.2 Login Hours Configuration

Academic Support Hours (Profile-based):

Administrative Hours:

11. Development Environment Setup

11.1 Sandbox Strategy

Full Copy Sandbox (Production Mirror):

Partial Copy Sandbox (Development):

Developer Pro Sandbox (Individual Development):

12. Change Set and Deployment Preparation

12.1 Deployment Strategy

Release Management:

• Major Releases: Beginning and end of each semester

• Minor Releases: Monthly during semester

• Hotfixes: As needed with proper approval