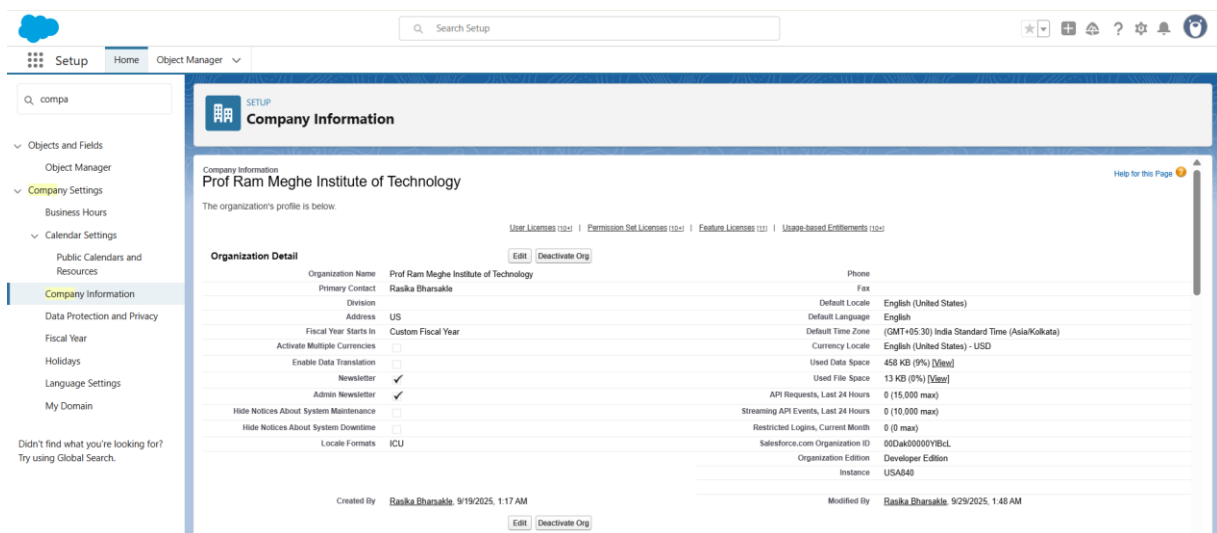# PHASE 2 – ORG SETUP & CONFIGURATION (INSTITUTE MANAGEMENT SYSTEM)

1. Salesforce Org Setup

- Created a **Developer Org** (free edition) specifically for the project.

- Updated **Company Profile**:

    o Company name set to *Prof Ram Meghe Institute of Technology*

    o Local time zone set to IST (India Standard Time).
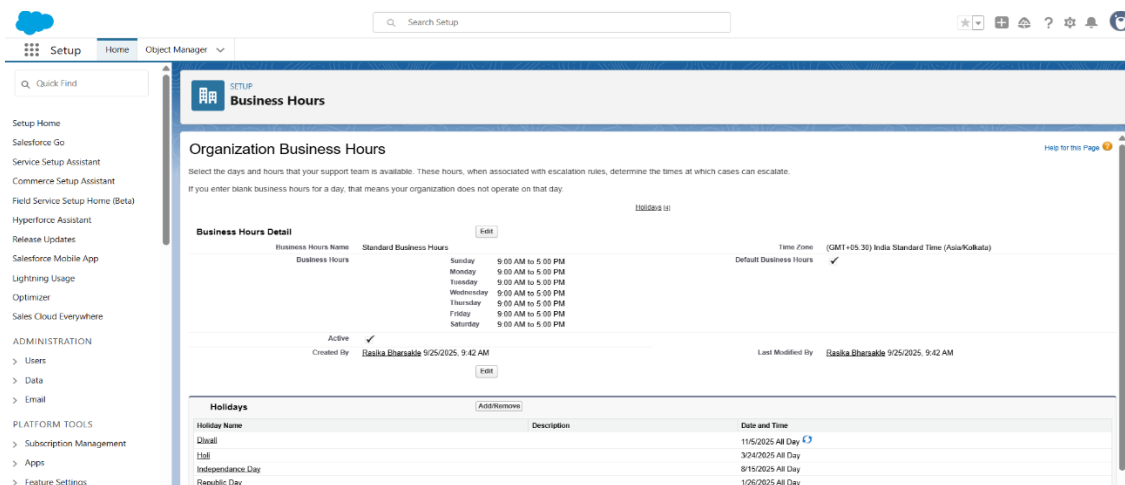
    o Currency set to INR.

2. Business Hours and Holidays

- Defined business hours as **9 AM – 6 PM, Monday to Friday**.

- Added common Indian public holidays (e.g., Independence Day, Republic Day) so approval flows will not run on these days.

3. Fiscal Year Setup

- Used the **Standard Fiscal Year (Jan–Dec)** to align with event planning and financial reporting.

4.User Setup

- Created separate users for key roles:

o Institute Admin

o Faculty

o Student

5.Profile

- **Faculty Profile**:
  - o Can access **Student Records, Attendance, courses.**

  ➢ **Permission:**

  - o Student Object-Read/Write(For Their students).
  - o Attendance Object-Full Access.
  - o Fees Object-Read only.

- **Student Profile**:
  - o Can access only their own records.

  ➢ **Permission:**

  - o Student Object-Read(self Only)
  - o Attendance Object-Read(self Only)
  - o Course Object-Read Only

6.Roles and Hierarchy

- **CEO** at top of hierarchy.
- **Principle** below CEO,acts as head of the institute.

- **HOD** positioned under Principle.

- **Faculty** lowest in this branch.
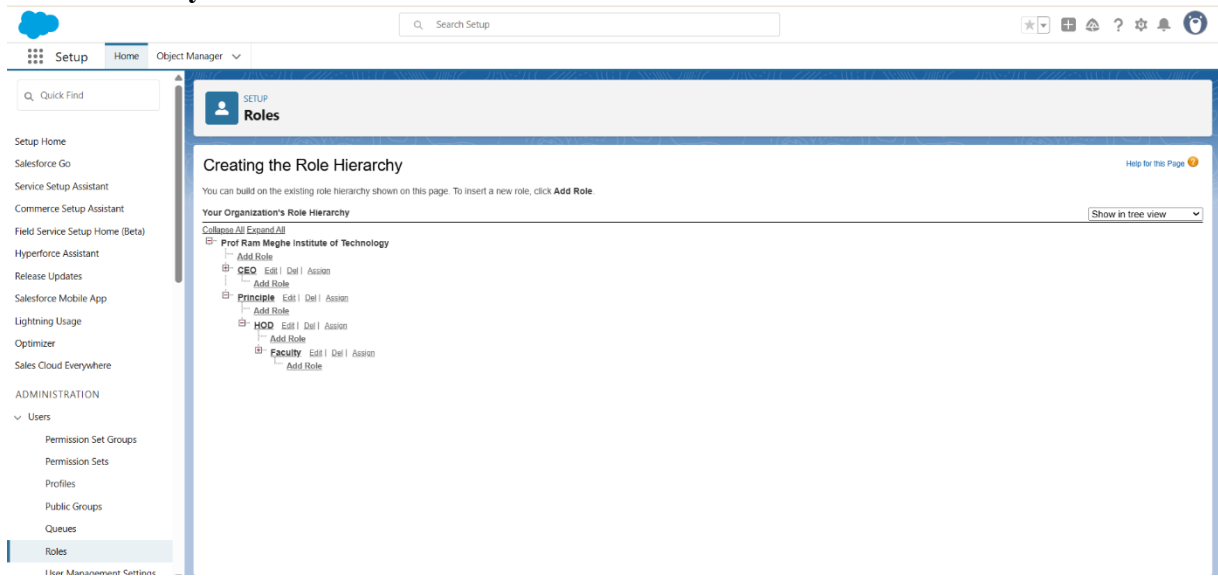
7. Org-Wide Defaults (OWD) and Sharing Rules

- **Student Object**: Private → only the record owner(faculty) and their hierarchy(HOD,Principle)can see student records.

- **Course Object**: Public Read Only → everyone can see available courses,but only authorized users ca edit.

- Created sharing rules so that:

    o faculty of the same department can view each others

    courses/attendance records for collaboration.

    o   HOD can access all student records within their

    department,even if they don't own them.
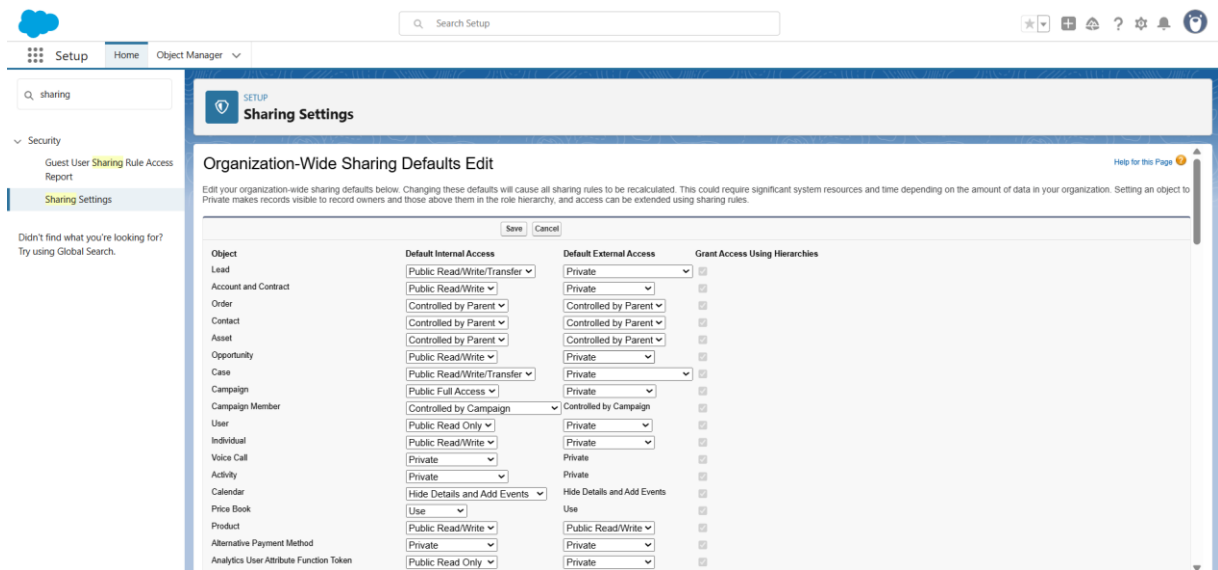
8.Outcome of Phase 2:

At the end of this Phase: The Institute Management System has a fully configured salesforce org with:

- Secure user roles and profile.
- Define record visibility & data sharing rules.
- Practical alignment with an academic institutions structure.