SkillSync – Phase 2: Org Setup & Configuration Report

Project Title: SkillSync- Knowledge and Expertise Management

Phase2 – Org Setup & Configuration

Date: 23 September 2025
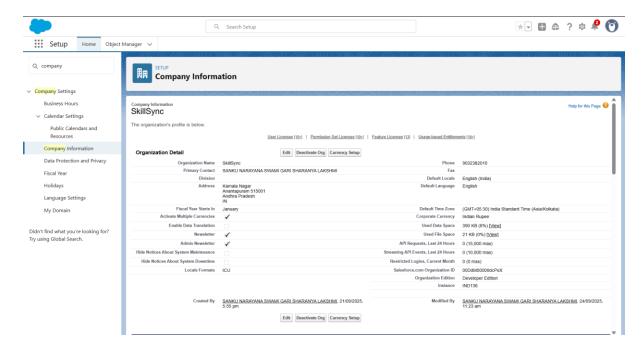
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1.Introduction

Phase 2 of the SkillSync project focused on setting up the Salesforce Developer Org, configuring the company profile, defining business hours, fiscal year, users, roles, and implementing security and access control. The purpose of this phase was to establish the technical foundation of the system, ensuring that all stakeholders (employees, project managers, mentors, and administrators) have the appropriate access, permissions, and configurations before moving into data modeling and automation in Phase 3.
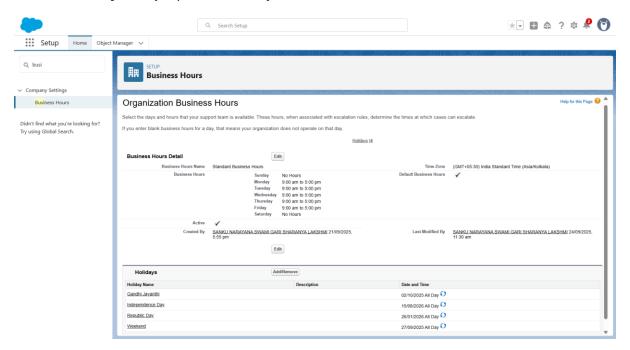
2. Developer Org & DevOps Setup

- Salesforce Developer Edition Org created

- Tools installed and configured:

  • VS Code with Salesforce extensions

  • Salesforce CLI (SFDX) - GitHub repository created and connected

 - Initial DevOps workflow established using SFDX commands and GitHub version control
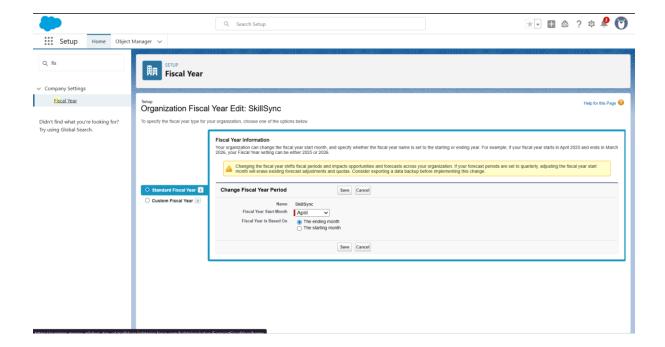
3. Company Profile & Global Settings

- **Company Name:** SkillSync Innovations.

- **Primary Contact:** SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI

- **Currency:** Indian Ruppee.

- **Default Time Zone:** IST (GMT+5:30).

- **Locale:** English (India)

- **Business Hours:** 9 AM – 5 PM(Mon-Fri).

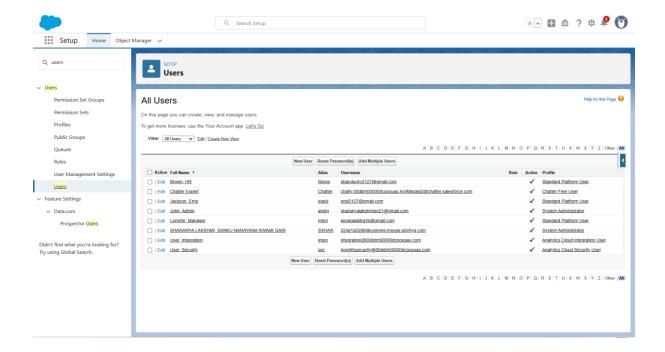- **Holidays:** Major public holidays and Weekends.

- **Fiscal Year:** Standard Fiscal Year, Starting April
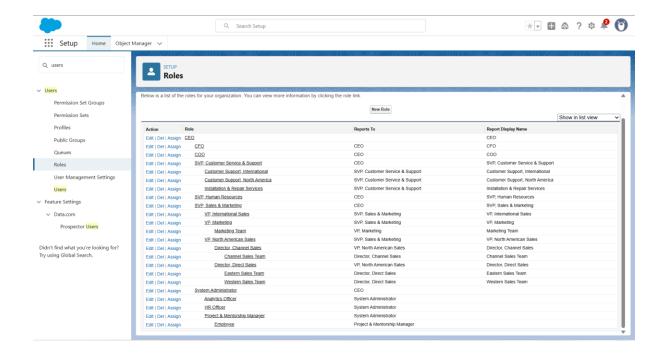
4. User Setup & Licenses

- **Admin User:** Full control (creates users, automations, dashboards, manages org setup).

- **Manager User:** Manages Projects, Tasks, and Mentorship opportunities, reviews reports and engagement logs.

- **Employee Users:** Add skills, complete tasks, join mentorships, track learning paths, and earn points & badges.

- **HR User:** Onboards new employees, manages employee records, assigns learning paths.

- **Reporting/Analytics User:** Views dashboards and reports, read-only access to analytics.
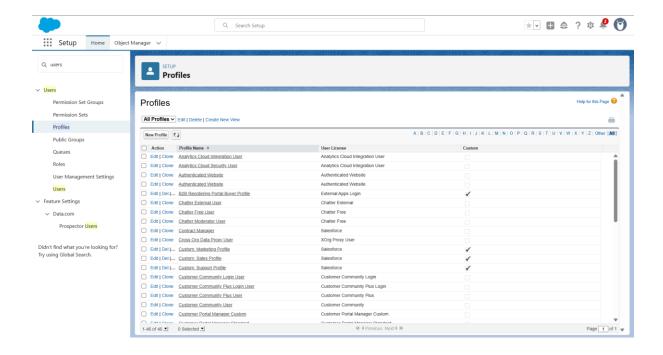
5. Roles, Profiles & Permission Sets

Roles Created:

- System Administrstor
- Project & Mentorship Manager
- Employee
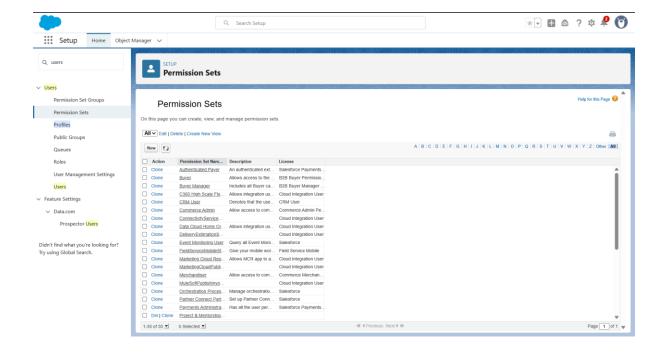- HR Officer
- Analytics Officer

Profiles Defined:
- System Administrator
- Manager
- Employee
- HR
- Report (Read-Only and reporting)

Permission Sets

User	Profile	Permission Set(s)	Role	Responsibilities
Admin User	System Administrator	(Optional) Advanced Automation Access	System Administrator (Top of hierarchy)	Full CRUD access to all objects, manage users, roles, permission sets, flows, dashboards.
Manager User	Manager Profile (Custom)	Project & Mentorship Admin	Project & Mentorship Manager (Reports to Admin)	Manage Projects, Tasks, Mentorships, Engagement Logs, Reports & Dashboards.
Employee User	Employee Profile (Custom)	Skill & Learning Enhancer	Employee (Reports to Manager)	Add/update Skills, complete Tasks & Learning Paths, join Mentorships, track Engagement Logs,

User	Profile	Permission Set(s)	Role	Responsibilities
				earn Points & Badges.
HR User	HR Profile (Custom)	HR Operations	HR Officer (Parallel to Manager, reports to Admin)	Onboard Employees, manage Employee records, assign Learning Paths, limited Reports & Dashboards access.
Reporting/Analytics User	Read-Only Profile	Enhanced Analytics	Analytics Officer (Reports to Admin)	View Dashboards & Reports, filter/export analytics, no CRUD access.

6. Org-Wide Defaults (OWD) & Sharing Rules

OWD Settings:

- **Employee records:** Private
- **Projects & Tasks:** Controlled by Parent
- **Skills & Learning Paths:** Read Only

Sharing Rules:

- **Managers:** Can view and manage their assigned Employees, Projects, and Mentorships
- **HR Users:** Can view and update Employee records, assign Learning Paths

- **Reporting/Analytics Users:** Can view dashboards and reports

7. Security & Login Policies
- **Password Policies:** Configured as per Salesforce standards
- **Login Access:** No IP restrictions (development phase)
- **Field-Level Security:** Restricted for sensitive fields (e.g., salary, performance data)
- **Audit Trail:** Enabled to track changes in users, roles, and objects

8. Deployment Workflow
- **Development Environment:** Salesforce Developer Org
- **Version Control:** Managed with GitHub
- **Metadata Deployment:** Using SFDX commands
- **Future Plan:** Use Change Sets / Packages for Sandbox → Production migration

9. Challenges & Learnings
- Clarified the difference between **Profiles vs Permission Sets**
- Learned the importance of **OWD & Sharing Rules** for controlling data access
- Realized **User Roles and Profiles** directly impact visibility of Projects, Tasks, and Skills

10. Next Steps (Phase 3: Data Modeling & Relationships)
- Create custom objects: **Employees, Skills, Projects, Tasks, Learning Paths, Mentorships, Engagement Logs**
- Define relationships between objects (**Master-Detail / Lookup**)
- Setup **Record Types**, **Page Layouts**, and **Schema Builder**
- Integrate security: Assign Profiles, Permission Sets, and OWD as per user hierarchy