Phase 2: Org Setup & Configuration !!

This updated phase establishes the Salesforce foundation for the University 360° Student Lifecycle Management project with the modification that students and parents do not have system access. Only Faculty and Placement Cell users are allowed to store and manage student records, analyze academic performance, and generate reports for placement purposes.

1. Salesforce Edition Selection

- Recommended: Salesforce Education Cloud (built on Sales & Service Cloud).
- Students and parents will not have user licenses.
- Only Faculty, Placement Cell, and Admins require full/Platform Salesforce licenses.

2. Company Profile Setup

- Define University Org Profile (name, address, contact).
- Configure Business Hours (class timings, counselor/placement availability).
- Add Holidays (semester breaks, exam days).
- Align Fiscal Year with academic year (e.g., June–May).

3. User Setup & Licenses

- Users to create:
  • Faculty (Standard Salesforce users).
  • Placement Cell Officers (Standard Salesforce users).
  • Admins & Management (System admins).
- ❌ Students and Parents are not system users. Their data exists only as records.
- Estimate number of faculty and placement cell licenses required.

4. Profiles, Roles, and Permission Sets

- Profiles:
  • Faculty Profile – Create/update student records, exams, results.
  • Placement Cell Profile – View student performance, access reports, dashboards.
  • Admin Profile – Full system access.
- Roles:
  • Admin > Placement Cell > Faculty.
- Permission Sets (Optional):
  • Placement Cell Analytics Access – Provides extra permissions for reports, dashboards, and analytics.

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

- OWD Recommendations:
  • Student Data – Private (restricted to faculty and placement cell).
  • Course/Exam Info – Faculty can update, placement cell can view.
  • Placement Reports – Accessible only by placement cell and admins.

- Example Sharing Rules:
  • Placement Cell can access all student records for analysis.
  • Faculty access is limited to their own students.

6. Login & Security Policies

- Restrict logins to university network/IP ranges.
- Two-Factor Authentication (2FA) for placement cell and admins.
- Strong password policies (reset every 90 days).
- Login Hours – Faculty restricted to academic hours, placement cell as per requirement.

7. Dev Org & Sandbox Setup

- Developer Org for prototyping.
- Sandbox Types:
  • Developer Sandbox – For initial testing.
  • Partial Copy Sandbox – For student data testing.
  • Full Sandbox – For UAT (User Acceptance Testing).
- Use Change Sets or SFDX for deployment to production.

8. Steps to Configure Placement Cell Permission Set

1. Go to Setup → Permission Sets → New.
2. Create a Permission Set called 'Placement Cell Analytics Access'.
3. Under Object Settings → grant Read access to Student, Course, Exam, and Result objects.
4. Under System Permissions → enable Run Reports, Create and Customize Reports, Create and Customize Dashboards, and View Dashboards in Public Folders.
5. Assign the Permission Set to Placement Cell users.
6. Placement Cell can now analyze data without altering faculty workflows.

Outcome of Updated Phase 2

At the end of this updated Phase 2, the Salesforce University Org is configured such that:
- Students and parents are not system users.
- Faculty can create and update student records.
- Placement Cell can analyze performance and generate reports/dashboards.
- Admins retain complete access and control.
This secure and streamlined configuration ensures proper academic record management and placement analysis.