

Phase 2: Org Setup & Configuration (Library Book Borrowing System)

Goal

Prepare the Salesforce Developer Edition environment for the Library Book Borrowing System project. This includes company settings, user setup, profiles, roles, permissions, and security configurations.

Step 1: Login to Salesforce Developer Edition

- Logged in at login.salesforce.com.
 - Verified account using email OTP.
 - Reached the **Salesforce Home (Lightning/Classic)** page.

Step 2: Company Profile Setup

- **Company Information** updated:
 - Organization Name: *College Library System*
 - Default Locale: *English (India)*
 - Time Zone: *Asia/Kolkata*
 - Default Currency: *INR*
 - **Business Hours:** Created “Library Working Hours” (9:00 AM – 6:00 PM, Mon–Fri).
 - **Holidays:** Added Independence Day, Republic Day, etc.
 - **Fiscal Year:** Set to Standard Fiscal Year (Jan–Dec).

Screenshots: Company Info, Business Hours, Holiday Setup, Fiscal Year settings



Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can be created.

If you enter hours business hours for a day that crosses your organization's time zone, it will be converted.

Business Hours

Business Hours Name:	Business Hours (Timezone)	Last Modified By:	Date/Time
Business Hours	United States - Eastern Time (Eastern)	GUDE Admin (admin)	12/01/2023 9:35 AM
Monday	8:00 AM to 5:00 PM		
Tuesday	8:00 AM to 5:00 PM		
Wednesday	8:00 AM to 5:00 PM		
Thursday	8:00 AM to 5:00 PM		
Friday	8:00 AM to 5:00 PM		
Saturday	8:00 AM to 5:00 PM		

Created By: GUDE Admin (admin) Last Modified By: GUDE Admin (admin)

Last Modified Date: 12/01/2023 9:35 AM

Holidays

Holiday Detail

Help for this Page

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours ID:

Holiday Detail

Holiday Name:	Dussehra	Edit	Delete
Description:	Navratri festival		
Date and Time:	10/17/2025 All Day		
Created By:	GUDE Admin (admin) 11/13/2025, 8:35 AM	Last Modified By:	GUDE Admin (admin) 11/13/2025, 8:35 AM

Edit Delete

Fiscal Year

Organization Fiscal Year Edit: Library Book Borrowing System

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2026 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠️ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotes. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Save Cancel

Name: Library Book Borrowing System
Fiscal Year Start Month: January
Fiscal Year is Based On: The ending month The starting month

Save Cancel

Step 3: User Setup

- Created **3 users**:
 - Library Manager
 - Librarian
 - Assistant Librarian
- Used **default Salesforce roles** (CEO, Director, Customer Support) to represent library hierarchy.
- Each user was assigned:
 - User License: *Salesforce*
 - Profile: Manager Profile / Standard User (based on role).
- Usernames made unique using Gmail +suffix trick.

Screenshots: New User creation form, User List page with 3 users



The screenshot shows the Salesforce 'User Detail' creation form with three users listed:

User	Name	Role
Library Manager	LIBRARY MANAGER	Default_Director
Librarian	LIBRARIAN	Standard User
Assistant Librarian	ASSISTANT LIBRARIAN	Customer Support_Standard

Detailed description of the screenshot: The screenshot displays the Salesforce User Detail creation form. At the top, there are tabs for 'Edit', 'Sharing', 'Reset Password', 'Threads', and 'View Summary'. Below the tabs, the 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approvals, Manager, Executive Approval Request Email, and Federation ID. To the right of these fields are corresponding 'Role' columns: Default_Director, Standard User, and Customer Support_Standard respectively. Further down, there are sections for 'User License', 'Profile', 'Actions', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Mobile Push Registrations'. Each row has a 'View' link next to its respective section.

The screenshot shows the 'User Detail' section of the Salesforce setup interface. The user is named 'Manager User' with the email 'manager@librarysystems.co'. The 'Role' is set to 'Manager User'. Under 'User License Profile', it is listed as 'Standard User Profile'. The 'Actions' dropdown menu is open, showing options like 'Edit', 'Sharing', 'Reset Password', 'Delete', and 'View Summary'. The 'User Detail' table includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Defaulted Expressions, and Manager. The 'Actions' column for each row contains icons for Edit, Delete, and View.

Step 4: Profiles

- Cloned **Contract Manager Profile** to create:
 - *Manager Profile* → Full access + Reports & Dashboards.
- Manager Profile adjusted:
 - Run Reports
 - Create and Customize Reports
 - Manage Dashboards
- Librarian & Assistant currently using **Standard User Profile**.

Screenshots: Profile list, Manager Profile detail

The screenshot displays two pages from the Salesforce setup interface. The top part shows the 'Profiles' list, where the 'Manager Profile' is selected. The bottom part shows the 'Profile Detail' page for the 'Manager Profile', which is a 'Custom Profile' assigned to the 'Salesforce' user license. The 'Assistant Librarian Profile' is also shown as another custom profile. Both profiles have 'Custom Profile' checked in their respective 'Actions' columns.

Step 5: Roles

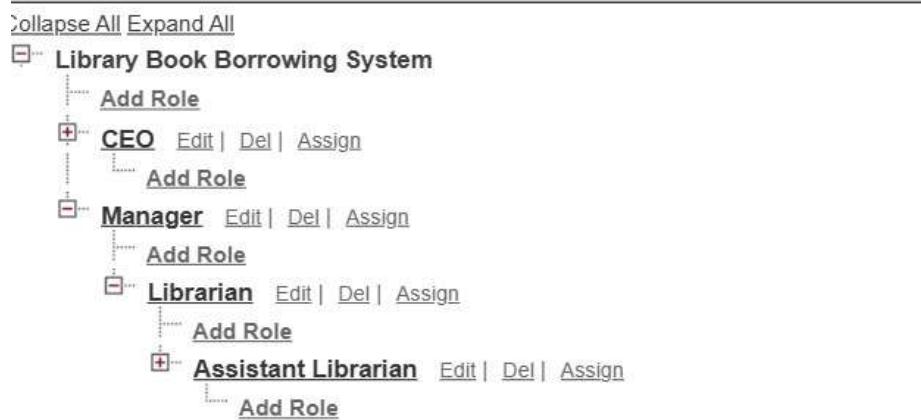
- Used **default Salesforce roles** instead of custom Library roles.
- Mapping:
 - CEO → Library Manager
 - Director → Librarian
 - Customer Support → Assistant Librarian

Screenshot: Role dropdown from User setup screen

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role,

Our Organization's Role Hierarchy



Step 6: Permission Sets

- Created “Report Access” Permission Set.
- Permissions enabled:
 - Run Reports
 - Create and Customize Reports
 - Manage Dashboards
- Assigned this permission set to **Librarian User**.

Screenshots: Permission Set creation, System Permissions page, Assigned Users

Permission Set
Report Access

Description: Allows Librarians to view Reports and Dashboards.

API Name: Report_Access

Namespace Prefix:

Created By: GLIDE AdminUser, 9/23/2025, 10:00 AM

Last Modified By: GLIDE AdminUser, 9/23/2025, 10:00 AM

Step 7: Org-Wide Defaults & Sharing Rules

- Current sharing rules configured only for standard objects.
- * Custom objects (**Book__c**, **Student__c**, **Borrow_Record__c**) are not yet created → OWD/sharing will be applied in Phase 3.
- Planned OWD:
 - Book__c → Public Read Only
 - Borrow_Record__c → Private
 - Student__c → Read/Write (to be finalized)
- Planned Sharing Rule: Borrow Records shared with Manager & Assistant Librarian.

Screenshot: Sharing Settings page (before custom objects appear)

Object	Default Internal Access	Default External Access	Grant Access Using Rule
Lead	Public ReadWriteTransfer	Private	✓
Account and Contact	Public ReadWrite	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Apex	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public ReadWrite	Private	✓
Case	Public ReadWriteTransfer	Private	✓

Step 8: Login Access Policies

- Restricted login hours for Librarian to match Library hours (9:00 AM – 6:00 PM).
- Saved profile changes.

Screenshot: Login hours for Librarian Profile

SETUP

Profiles

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Lock EP Records (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Personal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definition Access (0) | Enabled Data Access (0) | Standard Service Pipeline Status Access (0) | Enabled Custom Permissions (0)

Profile Detail	
Name	Manager Profile
User License	Salesforce
Description	
Created By	GUIDE Admin [9/23/2025, 9:14 AM]
Modified By	GUIDE Admin [9/23/2025, 9:14 AM]

Custom Profile

Page Layouts

Phase 2 Summary

- Environment configured for **College Library System**.
- 3 Users created (Manager, Librarian, Assistant Librarian).
- Manager Profile cloned and customized.
- Roles mapped using Salesforce default roles.
- Permission Set created for Librarians to access reports.
- OWD & Sharing planned for custom objects (to apply in Phase 3).
- Login hours restricted for Librarians.