Development: Design Apps for Multiple Users

Lesson 10: Managing Your Users' Experience

# Lesson Objectives

By the end of this lesson, you will be able to :
- List the different types and characteristics of licenses the Force.com platform supports
- List the things a profile controls in the application
- List the aspects of the profile that control access to data
- List the permissions that give a System Administrator the permissions he needs to manage the application
- State the types of profile that can be customized
- Create a profile
- Describe how to use permission sets with profiles
- Create a record type to filter picklist values
- Create a record type and page layout to alter the user experience
- Employ field-level security to lock down access to field data
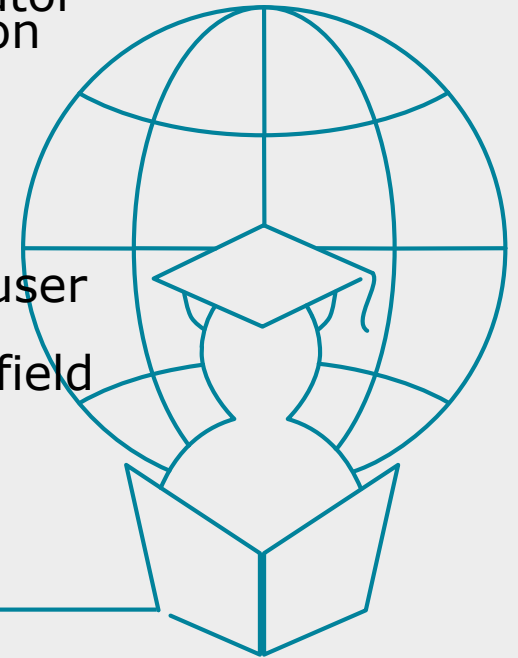
Each user must have a user license
Different types of user licenses allow different levels of access

User License Type	CRM Access	Platform Access
Salesforce	√	√
Salesforce Platform		√

Feat   ditional
feat

10.2: Overview of Profiles
What is a profile?

Defines a user's permissions to perform different functions
Determine how a user sees records to which s/he has access
Every user has a profile (ONLY 1 profile)
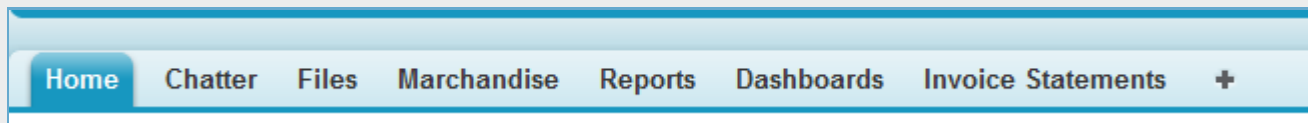We can group the things that profiles control into three categories:
- Permissions, Access to Data, and User Interface

Permissions	Access to Data	User Interface
General User Permissions	Field Level Security	Page Layouts
Administrative Permissions	Object CRUD	Record Types
Standard/Custom Object CRUD	Login Hours and IP Ranges	Tabs
		Applications

10.2: Overview of Profiles
What do profiles control?

Tab settings determine which tabs users see when they log in

Permissions determine what users can do to records to which they have access

Login Hours and Login IP Ranges
Sets the hours when users with a particular profile can use the system
Sets the IP addresses from which users with a particular profile can log in

Login Hours	Edit
No login hours specified	

Login IP Ranges	New
No login IP ranges specified. Users from any IP address are allowed to log in.	

Additional Information about Profiles

Standard profiles are available

- Permissions on standard profiles cannot be customized

Developers can create custom profiles

- When creating a new custom profile, developers need to select a profile from which to copy over permissions and settings

Each profile is associated with a license type

Typically, organizations will have one profile for each actor

10.2: Overview of Profiles
Optional Enhanced Profile User Interface

Enhanced Profile User Interface provides stream-lined experience for managing profiles

Enable under *Your Name* | Setup | Customize | User Interface

Profile
Force.com - Free User

Help for this Page 🟠

« Back to List: Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

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.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0]

Profile Detail   Edit   Clone   View Users

Name	Force.com - Free User		
User License	Force.com - Free	Custom Profile	☐
Created By	vaishali kunchur, 10/29/2012 10:42 PM	Modified By	vaishali kunchur, 11/1/2012 3:51 AM

10.3: Permission Sets
What are permission sets?

Permission sets are groups of permissions that can be assigned to specific users in addition to their existing profile permissions

How do permission sets work with profiles?

Users can have one profile
Users can have multiple permission sets

Profile		Permission Set 1		Permission Set 2		Permission Set 3	
Read	☑	**Read**	☑	**Read**	☑	**Read**	☑
Create	☐	Create	☑	Create	☐	Create	☑
Edit	☐	Edit	☐	Edit	☑	Edit	☑
Delete	☐	Delete	☐	Delete	☐	Delete	☐
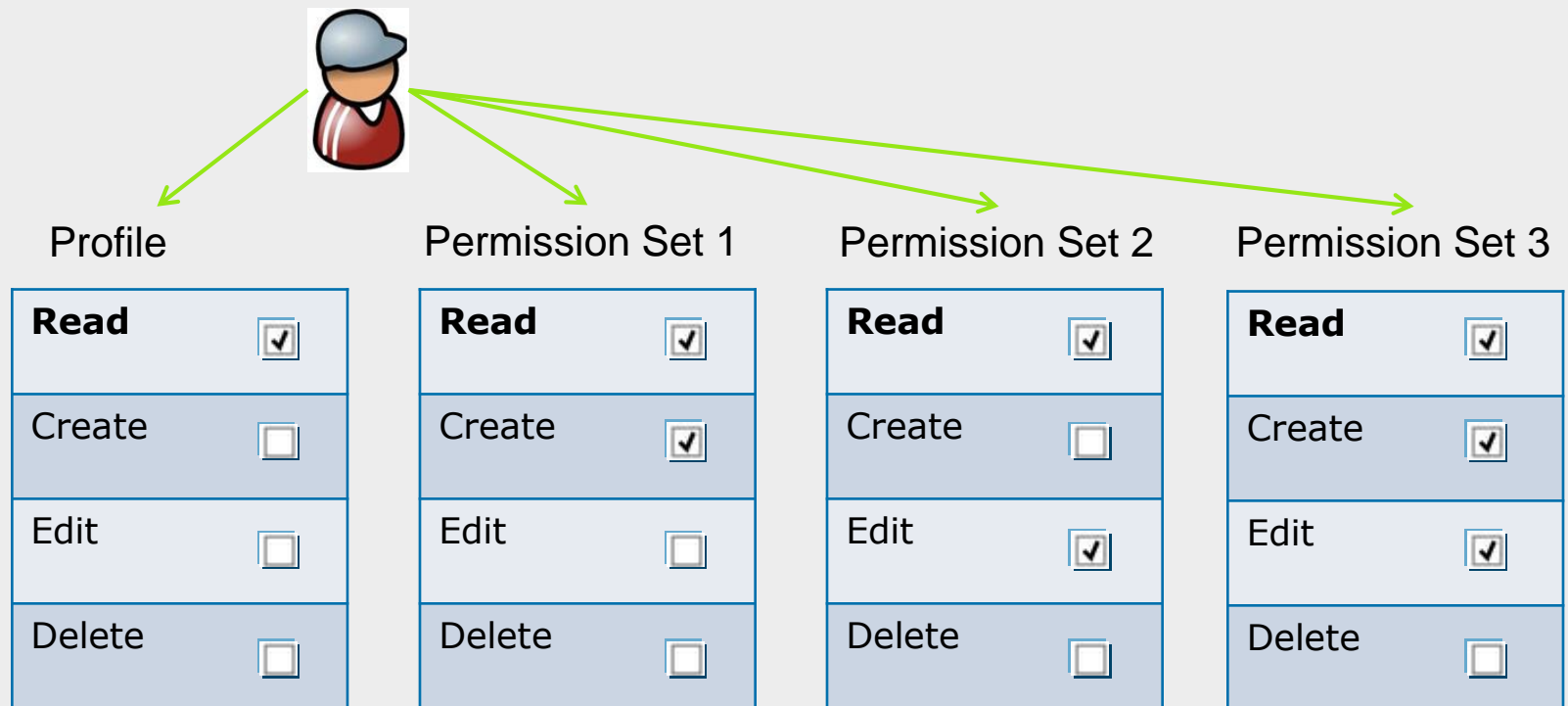
NOTE: Your Organization can have upto 1000 permission sets

10.3: Permission Sets
How do permission sets work with profiles?

Permission Sets:

Grant additional permissions beyond the permissions on a user's profile

Never deny permissions

Profile	Permission Set 1	Permission Set 2	Permission Set 3
Read ☑	**Read** ☑	**Read** ☑	**Read** ☑
Create ☐	Create ☑	Create ☐	Create ☑
Edit ☐	Edit ☐	Edit ☑	Edit ☑
Delete ☐	Delete ☐	Delete ☐	Delete ☐

+ **+** **=**
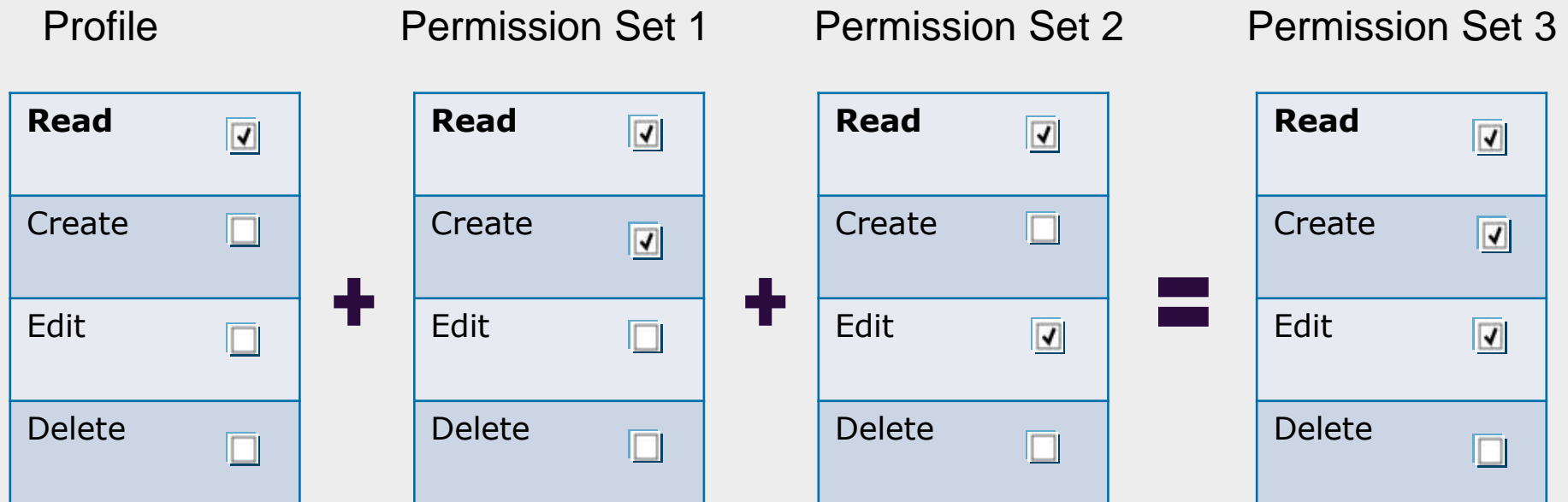
10.3: Permission Sets
How to Use Permission Sets with Profiles

Use profiles to assign the most restrictive permissions and access settings
Use Permission sets to grant additional permissions

Consider Using permission sets to:

Represent a concept, like a user's job title

Allow a subset of users to perform a certain set of tasks, such as deleting or transferring records

ALERT: If you are using one-off profiles, consider using permission sets instead

Which permissions can be set using Permission sets?

Assigned Apps
Settings that specify which apps are visible in the

Assigned Connected Apps
Settings that specify which connected apps are vis

Object Settings
Permissions to access objects and fields, and se

App Permissions
Permissions to perform app-specific actions, suc

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

System Permissions
Permissions to perform actions that apply across

Use permission sets to specify permissions for
- Applications
- Objects
- Tabs
- Fields
- Service provider
- Apex classes
- Visualforce pages

ALERT: Permissions not available in permission sets must still be set through Profiles

10.3: Permission Sets
Profiles Have a Set of Permissions

Profiles control Administrative Permissions

Administrative Permissions			
API Enabled	✓	Manage Knowledge Article Import/Export	☐
Author Apex	☐	Manage Letterheads	☐
Bulk API Hard Delete	☐	Manage Mobile Configurations	☐
Chatter Internal User	✓	Manage Package Licenses	☐

Profiles control General user Permissions

General User Permissions			
Activate Contracts	☐	Manage Cases	☐
Approve Contracts	☐	Manage Content Permissions	☐
Convert Leads	✓	Manage Content Properties	☐
Create and Customize Reports	✓	Manage Content Types	☐

10.4: Profiles and Permissions
A Few Permissions to Note

Administrative Permissions

API Enabled	✓	
Author Apex	☐	
Bulk API Hard Delete	☐	
Chatter Internal User	✓	
Create and Own New Chatter Groups	✓	
→ Customize Application	☐	
Edit HTML Templates	☐	
Edit Read Only Fields	☐	
Invite Customers To Chatter	☑	
IP Restrict Requests	☐	
Manage Analytic Snapshots	☐	
Manage Auth. Providers	☐	
Manage Billing	☐	
Manage Business Hours Holidays	☐	
Manage Call Centers	☐	
Manage Categories	☐	
Manage Chatter Messages	☐	
Manage Custom Report Types	☐	
Manage Dashboards	☐	
Manage Data Categories	☐	
Manage Data Integrations	☐	
Manage Dynamic Dashboards	☐	
Manage Email Client Configurations	☐	

Manage Knowledge Article Import/Export	☐	
Manage Letterheads	☐	
Manage Mobile Configurations	☐	
Manage Package Licenses	☐	
Manage Public Documents	☐	
Manage Public List Views	☐	
Manage Public Reports	☐	
Manage Public Templates	☐	
Manage Salesforce CRM Content	☐	
Manage Salesforce Knowledge	☐	
Manage Synonyms	☐	
Manage Users	☐	
Moderate Chatter	☐	
→ Modify All Data	☐	
→ Password Never Expires	☐	
Reset User Passwords and Unlock Users	☐	
Schedule Reports	☐	
Send Outbound Messages	✓	
Transfer Record	☐	
Use Team Reassignment Wizards	☐	
→ View All Data	☐	
View Data Categories	☐	
View Setup and Configuration	✓	

Permissions determine what users can do to records to which they have access

Custom Object Permissions												
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Invoice Statements	✓	✓	✓	✓	✓	✓	Marchandise	✓	✓	✓	✓	✓	✓
Line Items	✓	✓	✓	✓	✓	✓							

Lacking the "Read" permission for an object means that users will not be able to access it at all
- No Access in the application API
- No access on reports
- No access through search

Create a new profile
Create new custom profiles

Restricts users access to view and edit fields

Overrides any less-restrictive field access settings in page layouts and search layouts

Controls which fields users can access in related lists, list views, reports, Force.com Connect Offline, email and mail merge templates, custom links, and when synchronizing data or importing personal data

Demo

Restricting access using field level security

Record types are used to tailor user interaction experience to specific business needs

▪ Note: Record types only affect the way that data is displayed in the UI, It is not a form of sub-classing

Record types can determine page layouts, in conjunction with profiles

Hiring Manager	Page Layout A	Page Layout B
Recruiter	Page Layout C	Page Layout C

Or limit picklist options.

Record types can be set by users
- Existing records: **[Change]** link next to **Record Type** field
- New Records: Initial step before new record edit window
  - Ability to set default record type

The record types available in the picklist are determined by the user profile
- Edit Profile | Record Type Settings

Creating Record Types

How detail and edit pages are organized

Page section customization
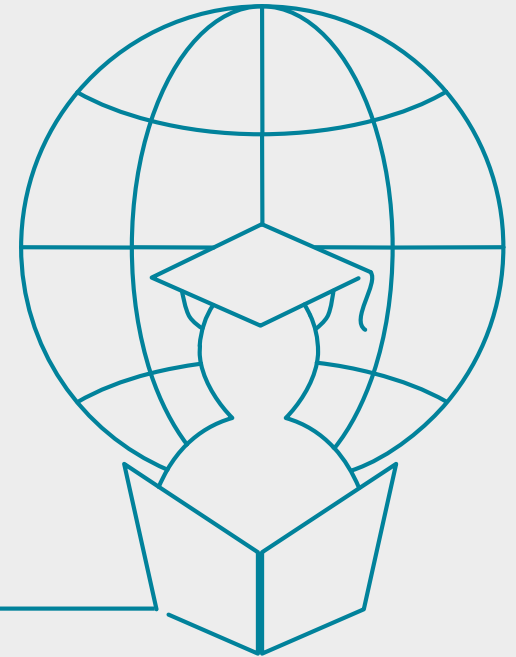
Which fields, related lists, and Custom Links a user sees

Field Properties – visible, read-only and required.

- Note: May establish unique layouts for different business scenarios

Creating Page Layouts
Creating Page Layouts and Record Types

Profiles
Permission sets
Field-Level Security
Record Types

What are the different types of licenses that are available?
What do profiles control?
What are the permissions that allow a System Administrator to manage the application?
System Administrators can customize the permissions of both standard and custom profiles.
    True or False
When creating a new profile, its possible to copy over settings from an existing profile
    True or False