Development: Data Management

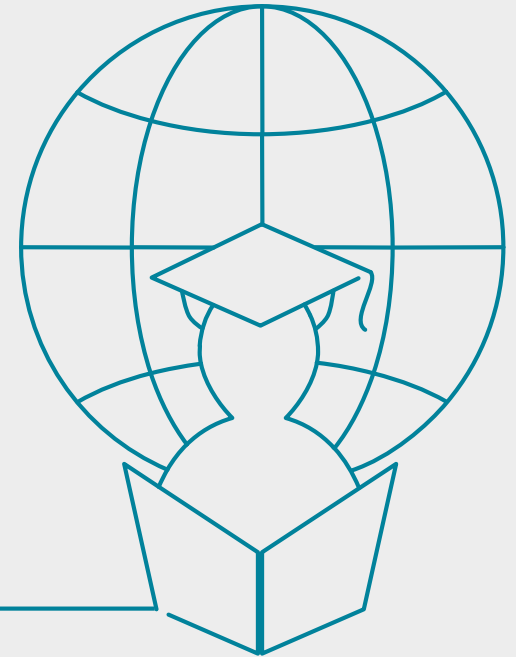## Lesson 23: Additional Data Management Functions

Lesson Objectives

By the end of this lesson, you will be able to :
- Mass transfer records
- Use Bulk API

23.1: Mass Transferring Records
Mass Transferring Records

Uses the Mass Transfer tool to transfer multiple records from one user to another

Requires the "Transfer Record"/ "Transfer Leads" permission, "Edit" on the object, and "Read" on the records being transferred

Mass Transfer Positions

Transfer from	User ▼	Mario Ruiz 🔍
Transfer to	User ▼	Amy Lojack 🔍

Find positions that match the following criteria:

Department ▼	equals ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 11/20/2012
- For date/time fields, enter the value in following format: 11/20/2012 2:32 AM

Mass Transferring Ownership of records

Bulk API

The Bulk API for high-volume data loads is designed to:
Improve throughput when loading large data sets into Salesforce
Increase stability, monitoring, and control of high-volume data loads
Allows better control and optimization of data center resources during data loads

NOTE: The Bulk API should only be used for over 50k records or for time-sensitive loads if there are over 200 records
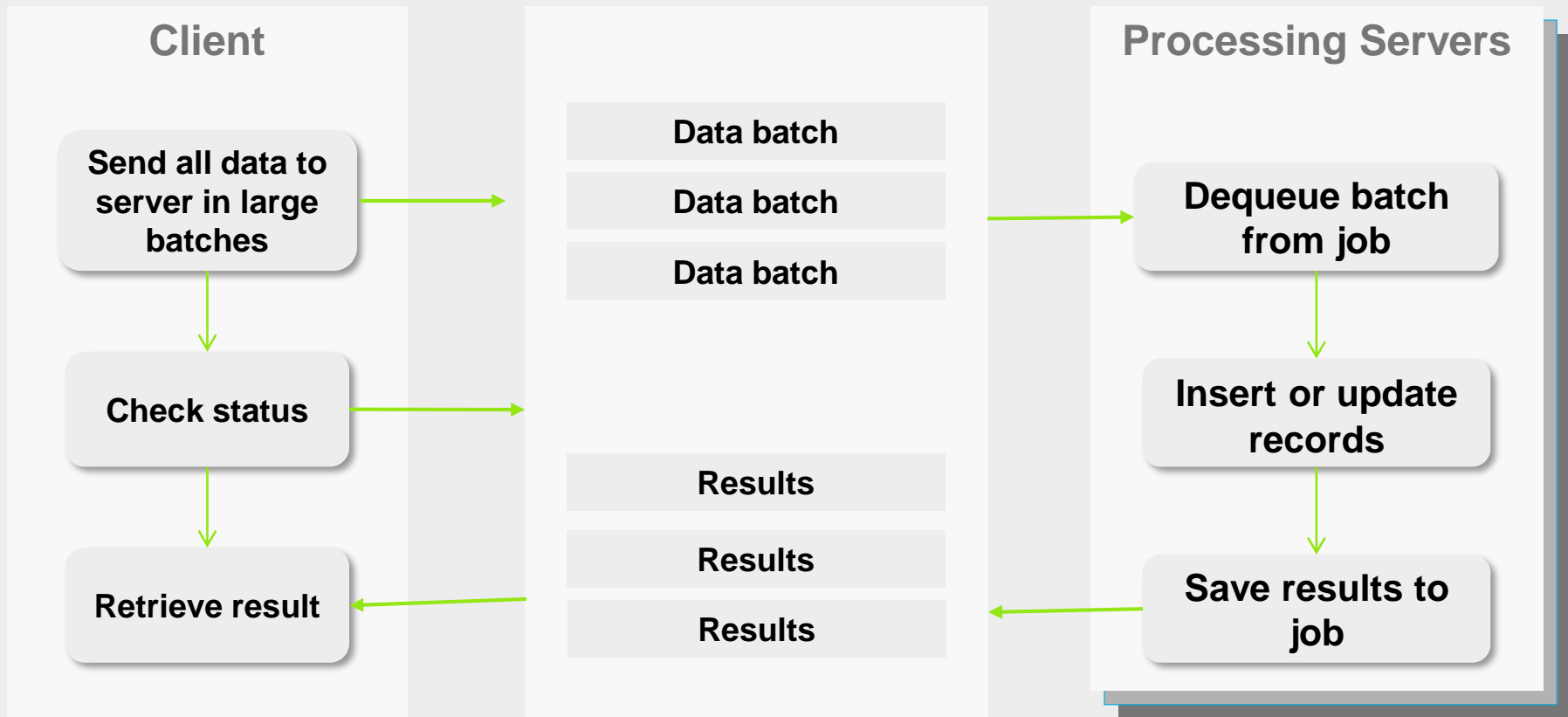
Data is transferred at full Network speeds, reducing Dropped connection

The whole data set is managed in a job that can be monitored and controlled from Setup menu

The data set can be processed faster by allocating multiple servers to process in parallel

Client

Send all data to server in large batches

Check status

Retrieve result

Data batch

Data batch

Data batch

Results

Results

Results

Processing Servers

Dequeue batch from job

Insert or update records

Save results to job

The data loader uses the SOAP-based Web Services API by default. To use the Bulk API instead:

1. Open the Data Loader client
2. Click Settings | Settings
3. Select the Use Bulk API checkbox
4. Click OK

There is an additional Enable serial mode for Bulk API option.
When the Bulk API is selected, users with the Bulk API Hard Delete permission can perform a hard delete.

Hard delete bypasses the Recycle Bin, so deleted records do not consume storage space and there is no way to retrieve them.

23.2: Bulk API
Monitoring Bulk Data Load Jobs

Monitoring bulk data loads requires the "Manage Data Integrations" permission

To track the status of bulk data load jobs,

The In Process Jobs list contains:
- Job ID, Object, Operation, Progress,
- Records Processed, Start Time, Status,
- Submitted By

The Completed Jobs list contains:
- End Time, Job ID, Object, Operation,
       Progress, Records Processed, Start Time,
     Status, Submitted By, Time to Complete.

Monitor

System Overview
Imports
Outbound Messages
Time-Based Workflow
Case Escalations
API Usage Notifications
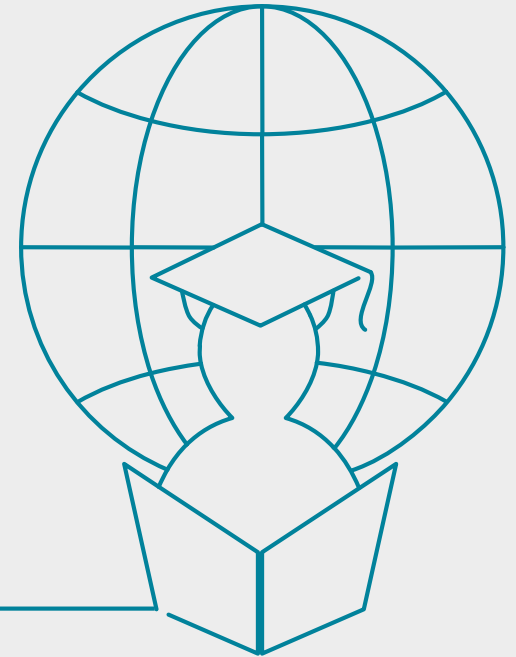Mass Emails
Email Snapshots
▼ **Jobs**
   Scheduled Jobs
   Apex Jobs
   Background Jobs
   Bulk Data Load Jobs
▶ **Logs**

Summary

Mass Transferring Records
Bulk API
Monitoring Bulk Data Load Jobs

Module Review

- Users can mass transfer records to which they do not have read access

    TRUE OR FALSE

- The Data Loader is the only way to utilize the Bulk API

    TRUE OR FALSE