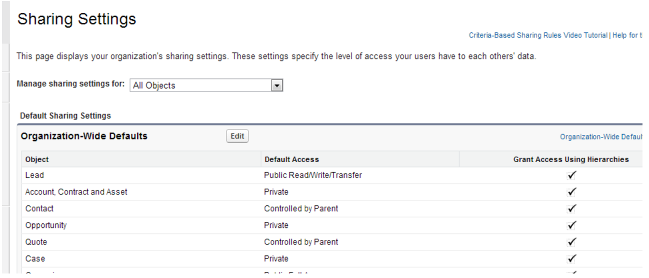
Grant Access Using Hierarchies

Problem

There is a custom object say 'XYZ' and ***OWD*** for this is set to '***Private***', which means record of this can be seen by only owner and users above in role-hierarchy and territory. However, to share this with other user, we can manually share it. The problem is that I don't want other users, who are above in role-hierarchy and territory of the user with whom record has shared, can see it.

Solution

We can un-check '***Grant Access Using Hierarchies***' check box for object 'XYZ' on 'Sharing Settings' page. We can go to***Setup >> Security Controls >> Sharing Settings*** and click on '***Edit***' button. On the edit page, we can un-check '***Grant Access Using Hierarchies***' for required object.



Sharing Settings

Criteria-Based Sharing Rules Video Tutorial | Help for t

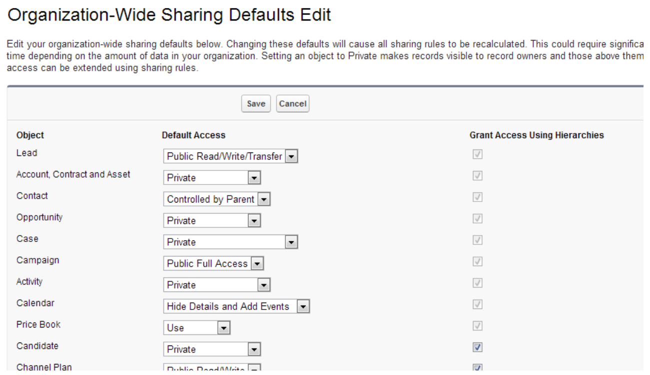
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: All Objects

Default Sharing Settings

Organization-Wide Defaults

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Private	✓
Contact	Controlled by Parent	✓
Opportunity	Private	✓
Quote	Controlled by Parent	✓
Case	Private	✓



Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significa time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them access can be extended using sharing rules.

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	☑
Account, Contract and Asset	Private	☑
Contact	Controlled by Parent	☑
Opportunity	Private	☑
Case	Private	☑
Campaign	Public Full Access	☑
Activity	Private	☑
Calendar	Hide Details and Add Events	☑
Price Book	Use	☑
Candidate	Private	☑
Channel Plan	Public Read/Write	☑

Major uses of 'Grant Access Using Hierarchies' are:-

1. If you disable the Grant Access Using Hierarchies option, sharing with a role or territory and subordinates only shares with the users directly associated with the role or territory selected. Users in roles or territories above them in the hierarchies will not gain access.
2. If your organization disables the Grant Access Using Hierarchies option, activities associated with a custom object are still visible to users above the activity’s assignee in the role hierarchy.
3. If a master-detail relationship is broken by deleting the relationship, the former detail custom object's default setting is automatically reverted to Public Read/Write and Grant Access Using Hierarchies is selected by default.

4. The Grant Access Using Hierarchies option affects which users gain access to data when something is shared with public groups, personal groups, queues, roles, or territories. For example, the View All Users option displays group members and people above them in the hierarchies when a record is shared with them using a sharing rule or manual sharing and the Grant Access Using Hierarchies option is selected. When the Grant Access Using Hierarchies option is not selected, some users in these groups no longer have access. The following list covers the access reasons that depend on the Grant Access Using Hierarchies option.

These reasons always gain access:

- Group Member
- Queue Member
- Role Member
- Member of Subordinate Role
- Territory Member
- Member of Subordinate Territory

These reasons only gain access when using hierarchies:

- Manager of Group Member
- Manager of Queue Member
- Manager of Role
- Manager of Territory
- User Role Manager of Territory

However, there is limitation with this too:-

1. Regardless of your organization's sharing settings, users can gain access to records they do not own through other means such as user permissions like “View All Data,” sharing rules, or manual sharing of individual records.
2. The Grant Access Using Hierarchies option is always selected on standard objects and is not editable.