Building Applications with Force.com - Part 1 (Controlling Access to Records)

Exercise Guide

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8-1: Create Custom Object Queues

Scenario:

Universal Containers wants to use the queue feature to manage the pool of recruiters working with open positions and candidates.

Goal:

Create a custom queue for recruiters to hold position and candidate records.

Task:

Create a queue for positions and candidates.

Time:

5 minutes

Instructions

1. Create a queue for positions and candidates.
   - A. Click **Setup | Manage Users | Queues**.
   - B. Click **New**.
   - C. Enter the queue information.
     - i. **Label**: `Recruiter Queue`
     - ii. **Queue Name**: `Recruiter_Queue` (This field auto-populates.)
     - iii. **Queue Email**: (leave blank)
     - iv. **Send Email to Members**: (selected)
     - v. Add the Position object and Candidate object to the Selected Objects box.
     - vi. Assign Mario Ruiz, Megan Smith, and Phil Katz as Selected Members of the queue.
   - D. Click **Save**.

8-2: Set Organization-Wide Defaults

Scenario:

The accessibility for Position, Candidate, Job Application, and Review records should be as follows:

- All users are allowed to view Position data. There will never be a position that some user cannot see. Only some users are allowed to update Position data.
- Individuals in Human Resources should be able to read, create, and edit the Candidate, Job Application, or Review records. This includes the VP and any subordinates.
- Interviewers should be permitted to see only those Candidate and Job Application records to which they have been assigned as interviewers. Additionally, they should only be permitted to view, create, and modify their own Review records.
- Hiring managers should only be able to see a Candidate, Job Application, or Review record if it is related to a Position for which they are responsible.
- Other users should not have access to Candidate, Job Application, and Review records.

Goal:

Use organization-wide defaults (OWD) to establish appropriate permissions for Positions, Candidates, Job Applications, and Reviews.

Tasks:

1. Update organization-wide defaults for Positions, Candidates, Job Applications, and Reviews.
2. Test your changes.

Time:

5 minutes

Instructions:

1. Change the organization-wide default setting for Positions.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. Click **Edit** to edit the organization-wide defaults.
   C. Set default internal access on the Position object to `Public Read Only`.
   D. Set default internal access on the Candidate object to `Private`.
   E. Set default internal access on the Job Application object to `Private`.
   F. Click **Save**.
2. Log in as Craig Kingman to test.
   A. Click **Setup | Manage Users | Users**.

B. Click the **Login** link next to Craig Kingman.
C. Verify that you cannot view any job application or candidate records.
D. Verify that you can view position records.
E. Log out.

8-3: Implement a Role Hierarchy

Scenario:

Universal Containers has added a new role called Product Manager and would like their hierarchy to reflect the addition.

Goal:

Complete the role hierarchy by adding a role for product managers.

Tasks:

1. Add a new Product Manager role.
2. Assign users to the new role.
3. Log in as a Product Manager and as the Director of Product Management to test the changes to the hierarchy.

Time:

5 minutes

Instructions:

1. Add a new Product Manager role.
   A. Click **Setup | Manage Users | Roles**.
   B. If you see the splash page, click **Set Up Roles**.
   C. Click the **Expand All** link.
   D. Under the Director Product Management node, click the **Add Role** link.
      i. **Label**: `Product Manager`
      ii. **Role Name**: `Product_Manager` (This field auto-populates.)
   E. Click **Save**.
2. Assign users to the new role.
   A. Click **Assign Users to Role**.
   B. Change the Available Users view to `All Users`.
   C. Move Amy Lojack and Andy Macrola to **Selected Users for Product Manager**.
   D. Click **Save**.
3. Log in as a Product Manager and as the Director of Product Management to test the changes to the hierarchy.
   A. Click **Setup | Manage Users | Users**.
   B. Click the **Login** link next to Amy Lojack.
   C. Create a new Position.
   D. Click **Logout**.

E. Click the **Login** link next to Frank Linstrom. Verify that you are able to edit the position that you just created as Amy.
F. Log out and log in as Megan Smith. Verify that you cannot edit the position created by Amy.

8-4: Create a Public Group

Scenario:

Universal Containers would like to create a public group that includes all interviewers so that they can easily share records and documents with them.

Goal:

Create a new public group including all interviewers.

Task:

Create a public group called All Interviewers.

Time:

5 minutes

Instructions:

1. Create a public group called All Interviewers.
   A. Click **Setup | Manage Users | Public Groups**.
   B. Click **New**.
      i. **Label**: `All Interviewers`
      ii. **Group Name**: `All_Interviewers` (This field auto-populates.)
      iii. **Search**: `Users`
      iv. **Selected Members**: `Craig Kingman, Melissa Lee, Harry Potterham, Flash Stevenson, Tom Zales`
   C. Click **Save**.

8-5: Implement Sharing Rules

Scenario:

Recruiters and their management should be able to read and update every position, candidate, job application, and review record in the application.

Goal:

Allow recruiters, recruiting managers, and the VP of Human Resources to view all elements of the recruiting process.

Task:

Create sharing rules to give recruiters the access they need to positions, candidates, job applications, and reviews.

Time:

10 minutes

Instructions:

1. Create sharing rules to give recruiters the access they need to positions, candidates, job applications, and reviews.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. In the Position Sharing Rules related list, click **New**.
      i. **Label**: `VP Human Resources Rule`
      ii. **Rule Name**: `VP_Human_Resources_Rule` (This field auto-populates.)
      iii. **Rule Type**: `Based on Record Owner`
      iv. **Position: owned by members of**: `Public Groups | All Internal Users`
      v. **Share with**: `Roles and Subordinates | VP Human Resources`
      vi. **Access Level**: `Read/Write`
   C. Click **Save**.
   D. Click **OK** to the dialog box that appears warning that “This operation could take significant time. Are you sure?”
   E. Repeat for the Candidate and Job Application objects.
   F. Log in as Megan Smith, the VP of Human Resources, to verify that you have access to all positions, candidates, and job applications.
   G. Click **Setup | Manage Users | Users**.
   H. Click the **Login** link next to Megan Smith.
   I. Click the Positions tab, select All from the **View** picklist, and click **Go!**
   J. Verify that Megan can edit all of the positions that you have created thus far.

8-6: Implement Manual Sharing

Scenario:

Establish manual sharing at Universal Containers to accomplish the remaining access levels:

- Grant hiring managers read and update access on positions and candidates where they are the hiring manager.
- Grant interviewers read access on job application and candidate records for people they are interviewing.

Goal:

Add manual sharing for various users to grant access on records where they are invested in the information.

Task:

Establish manual sharing for an existing position.

Time:

5 minutes

Instructions:

1. Establish manual sharing for an existing position. (**Note**: This must be accomplished on a record-by-record basis by the owner, the manager of the owner, or the system administrator of a record.)
    A. Click the Positions tab.
    B. Select a position from the Recent Positions list. (If you do not see any positions listed, select `All` from the **View:** picklist and click **Go!** This will bring up a list of all positions; click on any of them.)
    C. Note the Hiring Manager listed on the position.
    D. Click **Sharing**.
    E. Click **Add**.
        i. **Search**: `Users`
        ii. Add the hiring manager to the Share With box.
        iii. **Access Level**: `Read/Write`
    F. Click **Save**.

    Note: This would have to be repeated for each specific object record to be shared, as required.

    G. Log in as the hiring manager to verify that you can edit the position that you shared.

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i. Click **Setup | Manage Users | Users**.
ii. Click the **Login** link next to the hiring manager.
iii. Search for the position that you shared.

8-7: Create Apex Sharing Reasons (Optional)

Scenario:

Universal Containers wants to add new Apex sharing reasons to show the reasons why a record may be shared.

Goal:

Define the reasons that a record may be shared.

Tasks:

1. Create new Apex sharing reasons.
2. Add sharing on a position record to see the new sharing reasons.

Time:

5 minutes

Instructions:

1. Create a new Apex sharing reason.
   A. Click **Setup** | **Create** | **Objects** | **Position**.
   B. On the Apex Sharing Reasons related list, click **New**.
      i. **Reason Label**: `Approved Position`
      ii. **Reason Name**: `Approved_Position` (This field auto-populates.)
   C. Click **Save & New**.
      i. **Reason Label**: `Approver`
      ii. **Reason Name**: `Approver`
   D. Click **Save & New**.
      i. **Reason Label**: `Hiring Manager`
      ii. **Reason Name**: `Hiring_Manager`
   E. Click **Save**.
2. Add sharing on a position record to see the new sharing reasons.
   A. Click the Positions Tab.
   B. Select any position.
   C. Click **Sharing**.
   D. Click **Add**.
   E. Take note of the new reasons in the **Reason** picklist.

