

Lab Solution Slides on Securing Force.com Application

Week 8

School of Software

Faculty of Engineering and Information Technology

University of Technology Sydney



SCHOOL OF SOFTWARE

Steps involved in the solution

- **Step 1**: Create an **employee** object. This object should have the following attributes: First Name (Text), Last Name (Text), Employee ID (Number), Department ID (Picklist), Email Address (Email), Date of Birth (Date), Salary (Currency), Qualification (Text), and CEO (Checkbox)?
 - (Step 1.1) Create five instances of the employee objects
- **Step 2**: Create two separate profile – one for the CEO and another one for the employees.
 - (Step 2.1) Create a new user and assign it to the employee profile. Check whether this new user can only see the required field
 - **Note**: Due to time constraints in the lab, you have been asked to create only two profiles. For this application, in reality, you are required to implement four different profiles, one for each of the four different types of users

Steps involved in the solution

- **Step 3:**
 - (Step 3.1) Determine and set the organization wide default for the employee object
 - (Step 3.2) Determine and implement a role hierarchy for the case study.

Step 1: Create a new employee object

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Employee

Example: Account

Plural Label

Employees

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Employee

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

—None—

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account i

Record Name

Employee ID

Example: Account Name

Data Type

Auto Number

Display Format

E-{000}

Example: A-{0000} [What Is This?](#)

Starting Number

001

Optional Features

☒ Allow Reports
☒ Allow Activities
☒ Track Field History

Figure 1: Creating a new employee object having the required fields

Step 1: Create the employee object

Custom fields in
the employee
object

Created By [Farookh Hussain](#), 7/05/2013 4:48 PM

Modified By [Farookh Hussain](#), 7/05/2013 4:55 PM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
Edit	Employee ID	Name	Auto Number	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Owner	Owner	Lookup(User,Queue)	

Custom Fields & Relationships

[New](#)

[Field Dependencies](#)

[Set History Tracking](#)

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	CEO	CEO__c	Checkbox		Farookh Hussain , 7/05/2013 4:57 PM
Edit Del	Date of Birth	Date_of_Birth__c	Date		Farookh Hussain , 7/05/2013 4:55 PM
Edit Del Replace	Department ID	Department_ID__c	Picklist		Farookh Hussain , 7/05/2013 4:51 PM
Edit Del	Email Address	Email_Address__c	Email		Farookh Hussain , 7/05/2013 4:54 PM
Edit Del	First Name	First_Name__c	Text(50)		Farookh Hussain , 7/05/2013 4:49 PM
Edit Del	Last Name	Last_Name__c	Text(50)		Farookh Hussain , 7/05/2013 4:50 PM
Edit Del	Qualification	Qualification__c	Text(50)		Farookh Hussain , 7/05/2013 4:56 PM
Edit Del	Salary	Salary__c	Currency(10, 4)		Farookh Hussain , 7/05/2013 4:55 PM

Related Lookup Filters

Figure 2: Define the required custom fields within the employee object

Step 1: Create employee object



View: [Edit](#) | [Create New View](#)

Recent Employees

No recent records. Click Go or select a view from the dropdown to display records.

- (a) Define and associate a tab for the employee object .
(b) Create five new instances of employees



View: [Edit](#) | [Create New View](#)

Recent Employees

Employee ID

[E-005](#)

[E-004](#)

[E-003](#)


[E-002](#)

[E-001](#)


The created instances of employee object

Figure 3: Create new instances of employee object

Step 1: Example employee object details

 Employee
E-001
[« Back to List: Employees](#)

Employee Detail Edit Delete Clone

Employee ID	E-001
First Name	Farookh
Last Name	Hussain
Department ID	Product;
Email Address	farookh.hussain@uts.edu.au
Date of Birth	8/04/1983
Salary	\$400,000.0000
Qualification	PhD
CEO	
Created By	Farookh Hussain , 7/05/2013 5:03 PM

Edit Delete Clone

Field of the of employee object. Note that the normal employees should not be able to see the CEO, Salary, Date of Birth fields of any employee record.

Figure 4: Example employee object

Employee profile vs. CEO profile

Permission Table for users with “CEO”

Employee Object (in the HRM application)

- Create, Read, Edit, and Delete all employee instances

Permission Table for User with “Employee”

Employee Object (in the HRM application)

- Only Read all employee instances. Should not be able to create, edit or delete them
- Should only be able to see the First Name, Last Name, Qualification, Department ID, and Email Address of employee object instances.

Step 2: Create a profile for CEOs (1/4)

- To create a new profile:
- Administration Setup → Manage Users → Profiles

Profile Edit
CEO

Set the permissions and page layouts for this profile.

Profile Edit

SaveCancel

Name

CEO

User License

Salesforce

Description

Custom Profile

☒

Custom App Settings

	Visible	Default		Visible	Default
Call Center	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Community	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter	<input checked="" type="checkbox"/>	<input type="radio"/>
Company ABC HRM Application	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console	<input type="checkbox"/>	<input type="radio"/>
Content	<input type="checkbox"/>	<input type="radio"/>	Site.com	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing	<input checked="" type="checkbox"/>	<input type="radio"/>			

Tab Settings

☐ Overwrite users' personal tab customizations


Standard Tab Settings



Home	Default On	Forecasts	Default Off
Accounts	Default On	Groups	Default On
Campaigns	Default On	Ideas	Default On
Cases	Default On	Leads	Default On
Chatter	Default On	Libraries	Default On
Console	Default On	Opportunities	Default On



Figure 5: Create a new profile for the CEO –
Configuring tab and application access for users of CEO profile

Step 2: Create a profile for CEO (2/4)

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#) 

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 6: Configuring access to custom and standard objects for users of CEO profile

Configure Field-Level Security for CEO profile

Step 1: Select Profiles under Manage Users

Step 2: Select Custom Field-Level Security with in the CEO profile

The screenshot displays the Salesforce App Setup interface. On the left sidebar, the 'Administration Setup' section is expanded, and 'Profiles' is selected. A red arrow points from the 'Profiles' link to the 'Field-Level Security' section in the main content area. Another red arrow points from the 'Field-Level Security' section to the 'Custom Field-Level Security' subsection, specifically to the 'Employee' profile.

App Setup

- Customize
- Create
- Develop
- Deploy
 - Schema Builder
 - Canvas App Previewer
 - Installed Packages
 - AppExchange Marketplace
 - Critical Updates

Administration Setup

- ☒ **Manage Users**
 - Users
 - Mass Email Users
 - Roles
 - Permission Sets
 - Profiles**
 - Public Groups
 - Queues
 - Login History
- Manage Apps
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Console Settings

Console Layout [\[Edit \]](#)

Page Layouts

Standard Object Layouts

Home Page Layout	DE Default [View Assignment]	Event	Event Layout [View Assign]
Account	Account Layout [View Assignment]	Lead	Lead Layout [View Assign]
Asset	Asset Layout [View Assignment]	Opportunity	Opportunity Layout [View Assign]
Campaign	Campaign Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assign]
Campaign Member	Campaign Member Page Layout [View Assignment]	Product	Product Layout [View Assign]
Case	Case Layout [View Assignment]	Social Persona	Social Persona Layout [View Assign]
Case Close	Close Case Layout [View Assignment]	Solution	Solution Layout [View Assign]
Contact	Contact Layout [View Assignment]	Task	Task Layout [View Assign]
Contract	Contract Layout [View Assignment]	User	User Layout [View Assign]

Custom Object Layouts

Employee	Employee Layout [View Assignment]
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Field-Level Security

Standard Field-Level Security

Account	[View]	Lead	[View]
Asset	[View]	Opportunity	[View]
Campaign	[View]	Opportunity Product	[View]
Campaign Member	[View]	Product	[View]
Case	[View]	Social Persona	[View]
Contact	[View]	Solution	[View]
Contract	[View]	Task	[View]
Event	[View]	User	[View]
Idea	[View]		

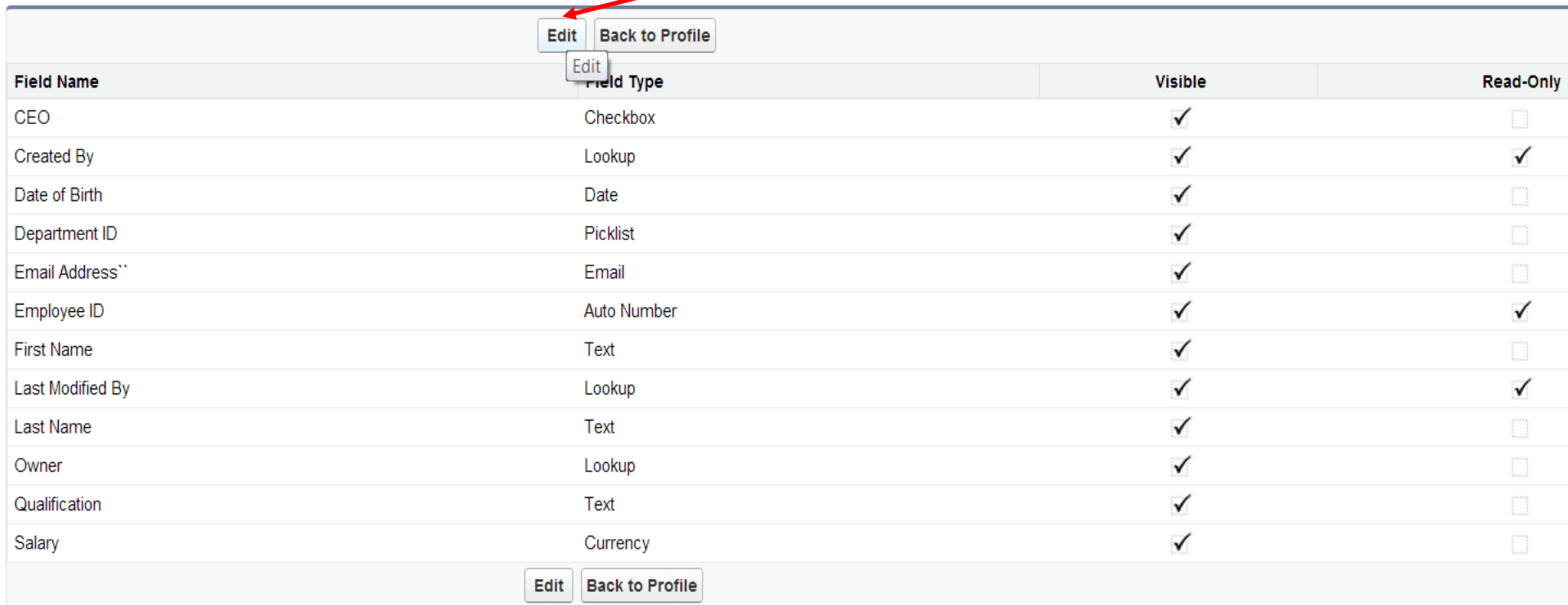
Custom Field-Level Security

Employee	[View]
----------	--------------------------

Step 2: Create a profile for CEO (3/4)

Employee Field-Level Security for profile
CEO

Click on Edit to configure field level access of employee fields for the users of CEO profile



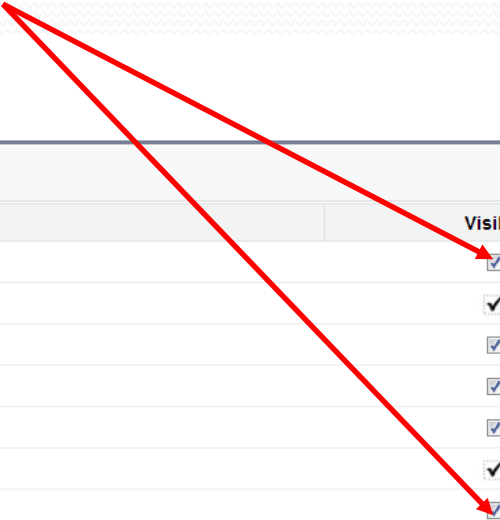
Employee Field-Level Security for profile CEO			
<div>Edit Back to Profile</div>			
Field Name	Field Type	Visible	Read-Only
CEO	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date of Birth	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department ID	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Address	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee ID	Auto Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Qualification	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salary	Currency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<div>Edit Back to Profile</div>			

Figure 7: Configuring field level access to the employee object for users of CEO profile

Step 2: Create a profile for CEO (4/4)

- Since the CEO should be able to view and edit all the fields on the Employee object - only “Visible” should be selected and “Read-Only” should not be selected.
- For standard fields such as “Created By”, “Last Modified By”, and “Employee ID”, it is not possible to give write any user permission to edit these fields

Employee Field-Level Security for profile
CEO



		Save	Cancel		
Field Name	Field Type			Visible	Read-Only
CEO	Checkbox			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date of Birth	Date			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department ID	Picklist			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Address	Email			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee ID	Auto Number			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Qualification	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salary	Currency			<input checked="" type="checkbox"/> Visible	<input type="checkbox"/>
		Save	Cancel		

Figure 8: Create a new profile for the CEO – Configuring field level access to the employee object

Step 2: Create a profile for Employees (1/3)

Name

User License

Description

Custom Profile ☒

Custom App Settings

	Visible	Default		Visible	Default
Call Center	<input type="checkbox"/>	<input type="radio"/>	Sales	<input type="checkbox"/>	<input type="radio"/>
Community	<input type="checkbox"/>	<input type="radio"/>	Salesforce Chatter	<input type="checkbox"/>	<input type="radio"/>
Company ABC HRM Application	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Sample Console	<input type="checkbox"/>	<input type="radio"/>
Content	<input type="checkbox"/>	<input type="radio"/>	Site.com	<input type="checkbox"/>	<input type="radio"/>
Marketing	<input type="checkbox"/>	<input type="radio"/>			

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On		
Accounts	<input type="text" value="Tab Hidden"/>	Forecasts	<input type="text" value="Tab Hidden"/>
Campaigns	<input type="text" value="Tab Hidden"/>	Groups	<input type="text" value="Tab Hidden"/>
Cases	<input type="text" value="Tab Hidden"/>	Ideas	<input type="text" value="Tab Hidden"/>
Chatter	<input type="text" value="Tab Hidden"/>	Leads	<input type="text" value="Tab Hidden"/>
Console	<input type="text" value="Tab Hidden"/>	Libraries	<input type="text" value="Tab Hidden"/>
Contacts	<input type="text" value="Tab Hidden"/>	Opportunities	<input type="text" value="Tab Hidden"/>
Content	<input type="text" value="Tab Hidden"/>	People	<input type="text" value="Tab Hidden"/>
Contracts	<input type="text" value="Tab Hidden"/>	Products	<input type="text" value="Tab Hidden"/>
Dashboards	<input type="text" value="Tab Hidden"/>	Profile	<input type="text" value="Tab Hidden"/>
Data.com	<input type="text" value="Tab Hidden"/>	Reports	<input type="text" value="Tab Hidden"/>
Documents	<input type="text" value="Tab Hidden"/>	Site.com	<input type="text" value="Tab Hidden"/>
Files	<input type="text" value="Tab Hidden"/>	Solutions	<input type="text" value="Tab Hidden"/>
		Subscriptions	<input type="text" value="Tab Hidden"/>


Custom Tab Settings



Employees



Figure 9: Create a new profile for the Employees – Configuring tab and application access for user of Employees' profile

Step 2: Create a profile for Employees (2/3)

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#) 

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 10: Create a new profile for the Employees – Configuring permissions on custom and standard objects for user of Employee profile

Step 2: Create a profile for Employees (3/3)

Employee Field-Level Security for profile
ABC Employee Profile

<div>Save Cancel</div>			
Field Name	Field Type	Visible	Read-Only
CEO	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date of Birth	Date	<input type="checkbox"/>	<input type="checkbox"/>
Department ID	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email Address	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee ID	Auto Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Qualification	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Salary	Currency	<input type="checkbox"/>	<input type="checkbox"/>
<div>Save Cancel</div>			

Figure 11: Create a new profile for the Employees –
Configuring field level access to the employee object

Step 2: Assign a user to the profile

- Create a new user

Administration Setup → Manage Users → Users

The screenshot shows the 'User Edit' interface in Salesforce. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'General Information' tab. The form is divided into two columns. The left column contains fields for personal and organizational details: First Name (Anhar), Last Name (Fazal), Alias (Anhar), Email (anhar.fazal@gmail.com), Username (anhar.fazal@gmail.com), Community Nickname (Anhar), Title (Dr), Company (University of Technology), Department (School of Software), and Division. The right column contains fields for user settings: Role (<None Specified>), User License (Salesforce), Profile (ABC Employee Profile), Active (checked), Marketing User (unchecked), Offline User (checked), Knowledge User (unchecked), Force.com Flow User (checked), Service Cloud User (unchecked), Site.com Contributor User (checked), Site.com Publisher User (checked), Mobile User (checked), Mobile Configuration, Accessibility Mode, Color-Blind Palette on Charts, Force.com Quick Access Menu (checked), Salesforce CRM Content User (checked), Receive Salesforce CRM Content Email Alerts (checked), Receive Salesforce CRM Content Alerts as Daily Digest (checked), Allow Forecasting (unchecked), Call Center, and Phone (95141856).

Figure 12: Create and assign a new user to the employee profile

Step 2: Log in using the different user account

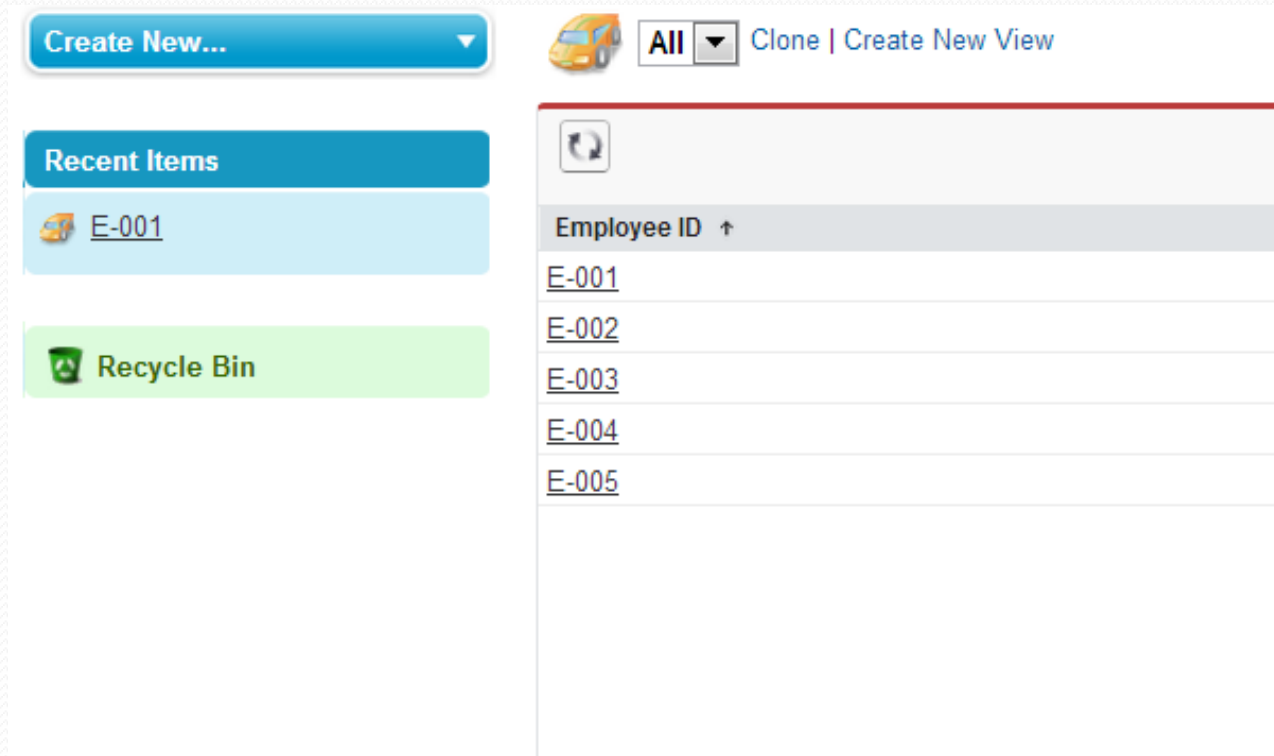


Figure 13: View the employee objects after logging in with different credentials – The credentials of a user assigned to the Employee profile

Step 2: View employee records



Employee
E-001

« [Back to List: Employees](#)

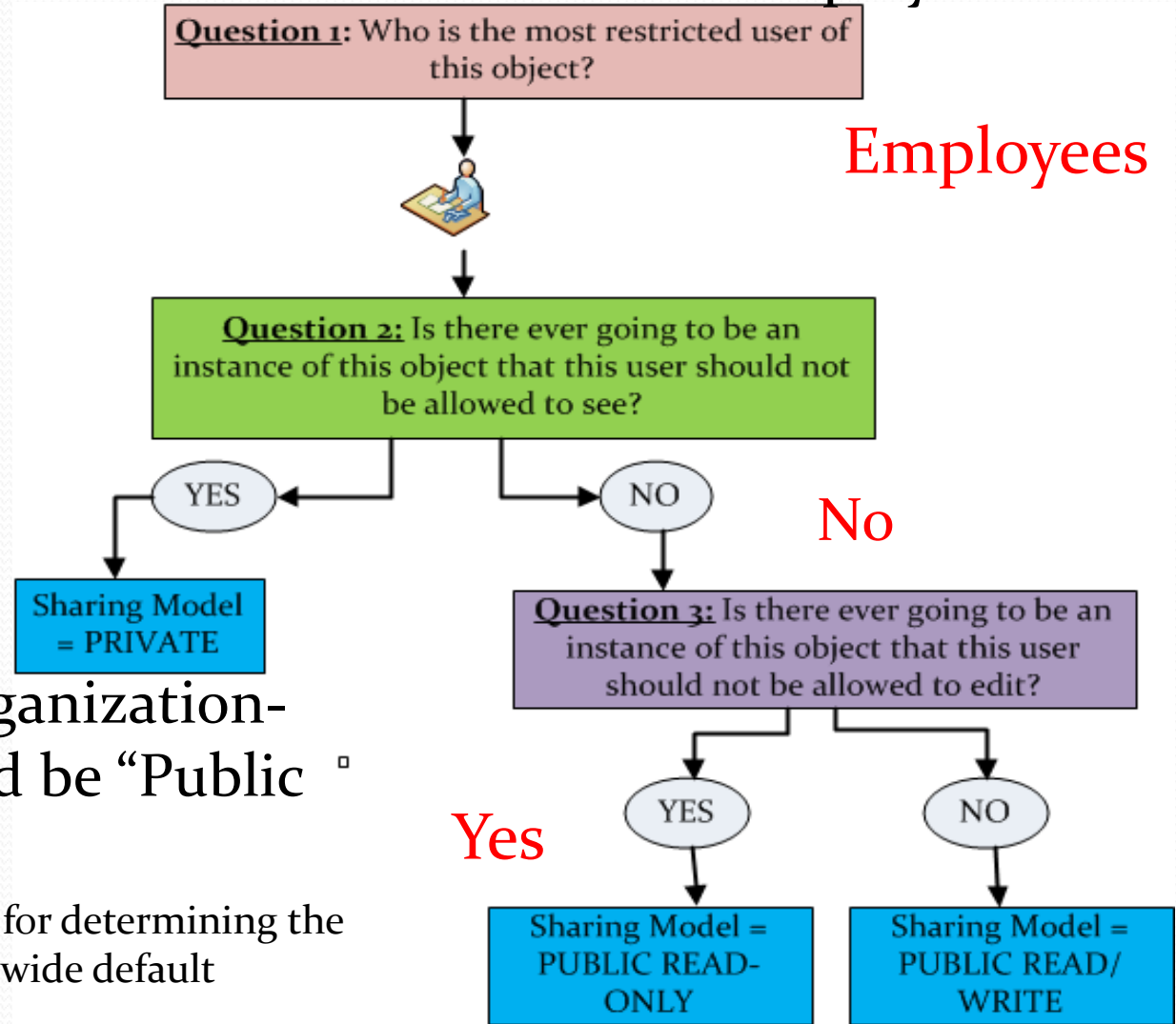
Employee Detail

Employee ID	E-001
First Name	Farookh
Last Name	Hussain
Department ID	Product;
Email Address``	farookh.hussain@uts.edu.au
Qualification	PhD
Created By	Farookh Hussain , 7/05/2013 5:03 PM

Figure 14: Different view of the employee object for users of employee profile

Step 3: Organization wide default for the employee object

- Determine the organization wide default for the employee object



- In this case the Organization-wide default should be “Public Read-Only”

Figure 15: Flow chart for determining the organization-wide default

Specifying Organization-Wide defaults on the Force.com platform

- In order to specify Organization-Wide defaults on the Force.com platform select
 - Administration Setup → Security Controls → Sharing Settings
 - In the Organization Wide Defaults area select “Edit”
 - Specify the organization wide default for the employee object.

Specifying Organization-Wide default

Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules an object to Private makes records visible to record owners and those above them in the role hierarchy

SaveCancel

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

Public Read/WritePrivatePublic Read OnlyPublic Read/Write

SaveCancel

Figure 16: Specify the organization-wide default for the employee object

Specifying Role Hierarchies on Force.com

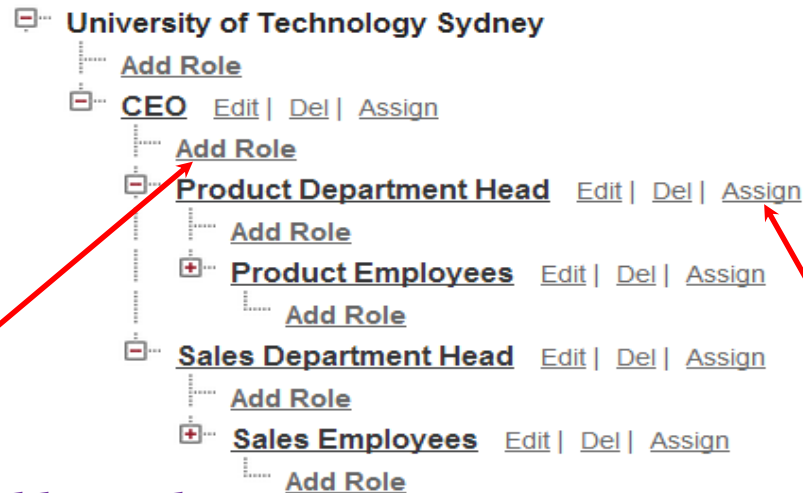
- In order to specify role hierarchy on the Force.com platform select
- Administration Setup → Manage Users → Roles

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



You can then define additional roles below the role of the Chief Executive Officer

You can then assign actual users to this role

Figure 17: Role Hierarchy for the Company ABC

Defining Role-Hierarchy for Company ABC

Role Edit
New Role

Role Edit



Label	<input type="text" value="Product Department Head"/>
Role Name	<input type="text" value="Product_Department_Head"/> 
This role reports to	<input type="text" value="CEO"/> 
Role Name as displayed on reports	<input type="text" value="Product Department Head"/>

Figure 18: Defining the Product Department Head Role

Defining Role-Hierarchy for Company ABC

Role Edit
New Role

Role Edit



Label	<input type="text" value="Sales Department Head"/>
Role Name	<input type="text" value="Sales_Department_Hea"/> 
This role reports to	<input type="text" value="CEO"/> 
Role Name as displayed on reports	<input type="text" value="Sales Department Head"/>

Figure 19 : Defining the Sales Department Head Role

Defining Role-Hierarchy for Company ABC

Role Edit

New Role



Role Edit	
Label	<input type="text" value="Product Employees"/>
Role Name	<input type="text" value="Product_Employees"/> 
This role reports to	<input type="text" value="Product Department Head"/> 
Role Name as displayed on reports	<input type="text" value="Product Employees"/>
<div>Save Save & New Cancel</div>	

Figure 20: Defining the role of Employees working in the Product Department Role

Defining Role-Hierarchy for Company ABC

Role Edit
New Role

Role Edit



Label	<input type="text" value="Sales Employees"/>
Role Name	<input type="text" value="Sales_Employees"/> 
This role reports to	<input type="text" value="Sales Department Head"/> 
Role Name as displayed on reports	<input type="text" value="Sales Employees"/>

Figure 21: Defining the role of Employees working in the Sales Department Role

Role Hierarchy of Company ABC

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

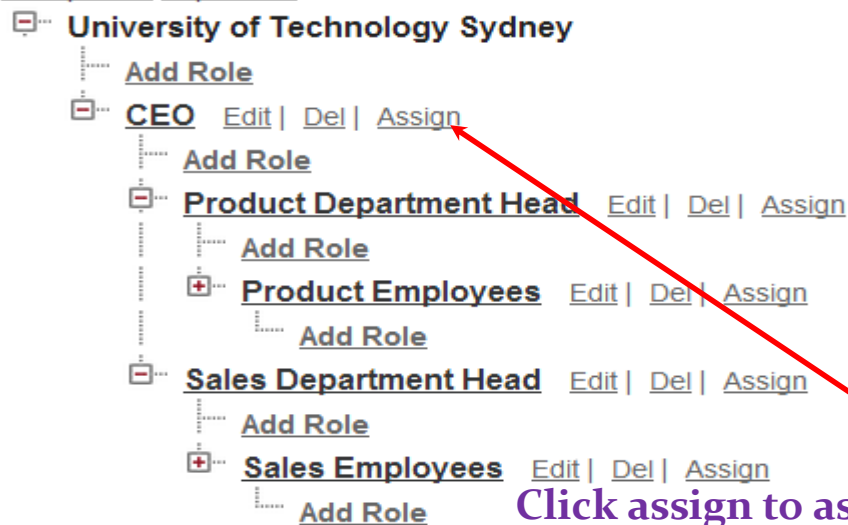


Figure 22: Role Hierarchy for the Company ABC

Assigning users to roles

Step 1: This is the role under consideration

Step 2: Search for users that you wish assigned to this role

Step 3: Select users that you wish assigned to this role

Step 4: Add or remove users assigned to the CEO role using these buttons

Step 5: List of current users assigned to the CEO role

Step 6: Save the role assignment

The screenshot shows a web interface for assigning users to a role. At the top, under the heading 'Roles', the role 'CEO' is selected. Below this, a message states: 'The users shown in the **Selected Users** list are currently assigned to the role **CEO**.' This is followed by instructions: 'To assign other users to this role:' and a list of steps: '• Make a selection from the drop-down list to show available users.' and '• Choose a user on the left and add them to the **Selected Users** list.' A note at the bottom of this section says: 'Removing a user from the **Selected Users** list deletes the role assignment for that user.' The main interface is divided into two sections. The left section, titled 'Available Users', contains a search bar with a dropdown menu set to 'All Users', a 'for:' label, a text input field, and a 'Find' button. Below the search bar is a list of available users, with 'Anhar Fazal' currently selected. The right section, titled 'Selected Users for CEO', contains a list of currently assigned users, with 'Farookh Hussain' selected. Between these two lists are 'Add' and 'Remove' buttons. To the right of the 'Selected Users' list is a tree view showing the hierarchy: 'University of Technology Sydney' > 'CEO' > 'Product Department Head' > 'Product Employees' > 'Sales Department Head' > 'Sales Employees'. At the bottom of the interface are 'Save' and 'Cancel' buttons.

Figure 23: Assigning users to role

Enable sharing using role hierarchy

- In order to enable sharing is records based on the specified role hierarchy, go to
 - Administration Setup → Security Controls → Sharing Settings
- Ensure that the checkbox against “Employee” corresponding to “Grant Access using hierarchies” is selected.

Enable sharing using role hierarchy

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 significant system resource your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using st

Ensure that this checkbox
has been selected

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account, Contract and Asset	Public Read/Write	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Campaign	Public Full Access	<input checked="" type="checkbox"/>
Activity	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	<input checked="" type="checkbox"/>
Employee	Public Read/Write	<input checked="" type="checkbox"/>

Figure 24:Enabling sharing using role hierarchies