Building Applications with Force.com - Part 1 (Managing Your Users' Experience)

Exercise Guide

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7-1: Create Custom Profiles

Scenario:

At Universal Containers (UC), recruiters need to be able to create, view, and modify any position, candidate, job application, or review that is in the system.

To comply with state and federal public records laws, all recruitment-related information must be saved for several years. Consequently, recruiters should NOT have the ability to delete any records in the Recruiting Application.

Goal:

Create a new profile for recruiters.

Tasks:

1. Create a custom recruiter profile.
2. Define the recruiter profile to accomplish the business requirements.
3. Assign users to this new profile.
4. Modify the existing profiles for the new objects.

Time:

15 minutes

Instructions:

1. Create a custom recruiter profile.
   A. Click **Setup | Manage Users | Profiles**.
   B. Click **New Profile**.
      i. **Existing Profile**: `Custom-HR`
      ii. **Profile Name**: `Custom-Recruiter`
   C. Click **Save**. (Click "No Thanks" on the popup box if it appears.)
2. Define the recruiter profile to accomplish the business requirements.
   A. Remove the ability to Read (as well as Create, Edit, and Delete) all standard objects except Documents.
      i. Select Object Settings from the Profile Overview list.
      ii. Click **Accounts**.
      iii. Click **Edit**.
      iv. Select `Tab Hidden` as the Tab Setting.
      v. Uncheck `Read` from the Object Permissions table.
      vi. Click **Save**.
      vii. Repeat these steps for these objects:

         Contacts
         Ideas
         Leads

Opportunities
Price Books
Products
Solutions

B. Set the custom object permissions to Read, Create, and Edit access.

    i. Select `Positions` from the Object picklist.
    ii. Click **Edit**.
    iii. Check `Read`, `Create`, and `Edit` from the Object Permissions table.
    iv. Click **Save**.
    v. Select `Candidates` from the **Object** picklist.
    vi. Click **Edit**.
    vii. Uncheck `Delete` from the Object Permissions table.
    viii. Click **Save**.
    ix. Set the permissions for the other custom objects objects by choosing the objects from the picklist, then clicking **Edit**, and assigning the following permissions:

Object	Read	Create	Edit	Delete
Interviewers	✓	✓	✓	
Job Applications	✓	✓	✓	
Job Postings	✓	✓	✓	
Job Posting Sites	✓	✓	✓	
Offers	✓	✓	✓	
Reviews	✓	✓	✓	

3. Assign users to this new profile.

    A. Click **Setup | Manage Users | Users**.
    B. Click the **Edit** link next to **Mario Ruiz**. (Make sure `All Users` is selected as the list view.)
    C. Select `Custom - Recruiter` from the **Profile** picklist.
    D. Click **Save**.

4. Modify the existing profiles for the Position object.

    A. Set the Position object for the Custom-Executive, and Custom-HR access:

Profile	Object Access
Custom-Executive	Create, Read, Edit, Delete, and View All
Custom-HR	Create, Read, Edit, Delete

7-2: Create Permission Sets

Scenario:

Hiring managers and interviewers have different needs and different levels of access to the information that will be stored in the Recruiting Application.

In addition, the access of hiring managers and interviewers to other portions of the organization needs to be maintained.

Goal:

Create permission sets for the hiring manager and interviewers.

Tasks:

1. Create a new permission set for hiring managers.
2. Create a new permission set for interviewers.
3. Assign users to the new permission sets.

Time:

10 minutes

Instructions:

1. Create a new permission set for hiring managers.
   A. Click **Setup | Manage Users | Permission Sets**.
   B. Click **New**.
   C. Type `Hiring Managers` as the **Label**, and click **Save**. (The other settings are correct as is. By leaving the license setting to `None`, this permission set can be used for any user regardless of their specific user license.)
   D. Click **Assigned Apps**.
   E. Click **Edit**.
   F. Select `Recruiting` from the Available Apps list and click **Add**.
   G. Click **Save**.
   H. Click **Permission Set Overview** and select `Object Settings` from the Overview list
   I. Click **Candidates** from the Object Settings list.
   J. Click **Edit**.
   K. Select `Visible` from the Tab Settings list.
   L. Select `Read` from the Object Permissions list and click **Save**.
   M. Set the permissions for the Interviewers, Job Applications, Job Postings, Job Posting Sites, Offers, Positions, and Reviews objects by choosing the objects from the picklist, then clicking **Edit**, and selecting the following:

Object	Tab Settings	Read	Create	Edit	Delete
Interviewers	Visible	✓	✓	✓	
Job Applications	Visible	✓			

Object	Tab Settings	Read	Create	Edit	Delete
Job Postings	Visible	✓			
Job Posting Sites	Visible	✓			
Offers	Visible	✓	✓	✓	
Positions	Visible	✓	✓	✓	
Reviews	Visible	✓	✓	✓	

2. Create a new permission set for interviewers.
   A. Click **Setup | Manage Users | Permission Sets**.
   B. Click **New**.
   C. Type `Interviewers` as the **Label** and click **Save**. All other settings are correct as is.
   D. Click **Assigned Apps**.
   E. Click **Edit**.
   F. Select `Recruiting` from the Available Apps list and click **Add**.
   G. Click **Save**.
   H. Click **Object Settings**.
   I. Click **Candidates** from the Object Settings list.
   J. Click **Edit**.
   K. Select `Visible` from the Tab Settings list.
   L. Check `Read` from the Object Permissions list and click **Save**.
   M. Repeat these steps for the Interviewers, Job Applications, Job Postings, Job Posting Sites, Offers, Positions, and Reviews objects, setting the permissions to those listed below:

Object	Tab Settings	Read	Create	Edit	Delete
Interviewers	Visible	✓			
Job Applications	Visible	✓			
Job Postings	Visible	✓			
Job Posting Sites	Visible	✓			
Offers	Visible	✓			
Positions	Visible	✓			
Reviews	Visible	✓	✓	✓	

3. Assign users to the new permission sets.
   A. Click **Setup | Manage Users | Permission Sets**.
   B. Select the `Hiring Managers` permission set.
   C. Click **Manage Assignments**.
   D. Click **Add Assignments**.
   E. Select `Clark Kentman`, `Frank Linstrom`, `Amy Lojack`, and `Andy Macrola` and click **Assign**.
   F. Click **Done**.

G. Click **Setup | Manage Users | Permission Sets**.
H. Select the `Interviewers` permission set.
I. Click **Manage Assignments**.
J. Click **Add Assignments**.
K. Select `Craig Kingman`, `Melissa Lee`, `Harry Potterham`, `Flash Stevenson`, and `Tom Zales` and click **Assign**.
L. Click **Done**.

7-3: Change Access Using Field-Level Security

Scenario:

In an effort to secure personal information on candidates, Universal Containers wants to ensure that recruiters cannot see or edit the Social Security Number of a candidate.

Goal:

Use field-level security to remove access to Social Security Numbers on candidate records.

Tasks:

Modify the field-level security for candidates to hide the **Social Security Number** field for recruiters.

Time:

5 minutes

Instructions:

1. Make the **Social Security Number** field hidden for recruiters.
   A. Click **Setup** | **Manage Users** | **Profiles** | **Custom – Recruiter**.
   B. Click **Object Settings** from the Apps section.
   C. Click **Candidates**.
   D. Click **Edit**.
   E. Clear `Read` on the **Social Security Number** field in the Field Permissions section.
   F. Click **Save**.
   G. Log in as Mario Ruiz to test that the **Social Security Number** field is no longer visible.
      i. Click **Setup** | **Manage Users** | **Users**.
      ii. Click the **Login** link next to Mario Ruiz.
      iii. Click on a candidate and then verify that the **Social Security Number** field is not visible.
   H. Log out.

7-4: Create Record Types

Scenario:

Technical hiring managers can create new positions, but they should only create positions in the IT and Engineering departments. The Position object has a department field that contains a picklist of values. When creating a technical position, hiring managers should have access only to the IT and Engineering values. When creating a non-technical position, hiring managers should have access to the other department values. Recruiters should be able to see and use all department values.

Goal:

Create a custom record type that limits the picklist choices available to hiring managers.

Tasks:

1. Create a technical position record type.
2. Repeat the process, creating a non-technical position record type.
3. Add the Record Type field to the Position Layout.

Time:

10 minutes

Instructions:

1. Create a new technical position record type.
   A. Click **Setup | Create | Objects | Position**.
   B. In the Record Types related list, click **New**.
   C. Enter the following details:
      i. **Existing Record Type**: `Master`
      ii. **Record Type Label**: `Technical Position`
      iii. **Record Type Name**: `Technical_Position` (This field auto-populates.)
      iv. **Description**: `This record type should be used for Technical Positions only.`
      v. **Active**: (selected)
      vi. **Enable for Profile**: `Custom - Executive`, `Custom - HR`, `Custom - Recruiter` and `System Administrator` only.
   D. Click **Next**.
   E. Select the `Apply one layout to all profiles` radio button.
   F. Click **Save**.
   G. Under Picklists Available for Editing, click the **Edit** link next to Department.
   H. Remove all but `IT` and `Engineering` from the Selected Values.
   I. Click **Save**.
   J. Click the **Back to Custom Object: Position** link near the top of the page.
2. Repeat the process, creating a Non-Technical Position record type, making it accessible to these profiles:

Custom – Executive
Custom – HR
Custom – Recruiter
System Administrator

3. Modify the **Department** picklist to remove the `IT` and `Engineering` values. Make sure to test your work.

4. Add the Record Type field to the Position Layout.

   A. Click **Setup | Create | Objects | Position**.
   B. In the Page Layouts related list, click the **Edit** link next to the Position Layout.
   C. Drag the **Record Type** field into the Information section below the **Start Date** field.
   D. Click **Save**.

7-5: Create Page Layouts

Scenario:

When creating new positions, technical hiring managers need to specify technical criteria desired for their candidates, such as programming language or operating system. Recruiters need to be able to create all kinds of positions.

Goal:

Create a new page layout to reflect differences between technical and non-technical positions.

Tasks:

1. Create fields for **Operating System** and **Programming Language**.
2. Create a new page layout for technical positions. On the new page layout, show the **Operating System** and **Programming Language** fields in a separate section.

Time:

15 minutes

Instructions:

1. Create new fields for **Operating System** and **Programming Language**.

   A. Click **Setup | Create | Objects | Position**.
   B. Under the Custom Fields & Relationships section, click **New**.

      i. **Data Type**: `Picklist`
      ii. Click **Next**.
      iii. **Field Label**: `Operating Systems`
      iv. **Picklist values**: `Windows`, `Unix`, `Mac` (on 3 separate lines)
      v. **Field Name**: `Operating_Systems` (This field auto-populates.)
      vi. Click **Next**.
      vii. Make the field visible to these profiles:

         Custom – Executive
         Custom – HR
         Custom – Recruiter
         System Administrator profiles

      viii. Click **Next**.
      ix. Uncheck all the page layouts and click **Save and New** to complete the field.

   C. Enter the data for the second new field.

      i. **Field Type**: `Picklist`
      ii. Click **Next**.
      iii. **Field Label**: `Programming Languages`
      iv. **Picklist values**: `COBOL`, `FORTRAN`, `.Net`, `Java`, `PHP`, `Perl`, `Python`
      v. **Field Name**: `Programming_Languages` (This field auto-populates.)

vi. Click **Next**.
vii. Make the field visible to these profiles:

Custom – Executive
Custom – HR
Custom – Recruiter
System Administrator profiles

viii. Click **Next**.
ix. Uncheck all the page layouts and click **Save** to complete the field.

2. Create a new page layout for technical positions. On the new page layout, show the **Operating System** and **Programming Language** fields in a separate section.

A. Click **Setup | Create | Objects | Position**.
B. In the Page Layouts related list, click **New**.

i. **Existing Page Layout**: `Position Layout`
ii. **Page Layout Name**: `Technical Position Layout`

C. Click **Save**.
D. Drag a new section from the palette to below the Description section.

i. **Name**: `Technical Skills`
ii. **Layout**: `1-Column`

E. Click **OK**.
F. Drag the **Operating Systems** and **Programming Languages** fields into the new section from the Information section.
G. If you have not already done so, drag the **Record Type** field into the Information section below the **Start Date** field.
H. Click **Save**.
I. Edit the page layout assignments for the Position object so Custom – Recruiter and System Administrator profiles always use the Technical Position page layout, while all other profiles will use the appropriate layout for the position.

i. In the Page Layouts related list, click **Page Layout Assignment**.
ii. Click **Edit Assignment**.
iii. Click the cell under the Non-Technical Position Record Type column for the Custom – Recruiter and System Administrator profiles and set **Page Layout to Use:** `Technical Position Layout`. (Use the **CTRL** key to select multiple items.)
iv. Click the Technical Position column heading and again set **Page Layout to Use**: `Technical Position Layout` to ensure that all users see the Technical Position Layout when viewing the Technical Record Type.
v. Click **Save**.

J. Log in as Mario Ruiz and verify your changes by creating a new position. Mario should see the Operating Systems and Programming Language fields regardless of whether he creates a technical or non-technical position.

7-6: Create Page Layouts and Record Types (Optional)

Scenario:

Universal Containers would like to implement an approval process for each position. This process will route positions to the approvers specified on the position. Once the position has been approved, the approvers no longer need to be listed on the position.

Goal:

Create page layouts and record types for approved positions.

Tasks:

1. Create new page layout for approved positions.
2. Create new record types for approved positions.

Time:

10 minutes

Instructions:

1. Create new page layout for approved positions.
   - A. Click **Setup | Create | Objects | Position**.
   - B. Under the Page Layout related list, click **Edit** next to Position Layout.
   - C. In the arrow under **Save**, click **Save As...**
   - D. **Page Layout Name**: `Approved Position Layout`
   - E. Click **Save**.
   - F. Navigate back to **Setup | Create | Objects | Position**.
2. Create new record type for approved positions.
   - A. Scroll down to the Record Types related list and click **New**.
     - i. **Existing Record Type**: `Technical Position`
     - ii. **Record Type Label**: `Approved Position`
     - iii. **Description**: `This record type will be used for positions, once they have been approved.`
     - iv. **Active**: (selected)
     - v. Do not enable for any profile.
   - B. Click **Next**.
   - C. Select `Apply one layout to all profiles: Approved Position Layout`.
   - D. Click **Save**.
   - E. Click the **Back to Custom Object: Position** link.
   - F. Under the Record Types related list, click **Page Layout Assignment**.
   - G. Verify that the Approved Position layout is assigned to the Approved Position record type.