Data Security Mini Project

Taking what you learned from the Data Security trailhead module, you are going to build out (part of) a data security model for a Salesforce recruiting app.

**Scenario**:

You have been hired as a Salesforce consultant to bring order to a chaotic hiring process at ACME Fireworks. After a discovery and analysis session you came up with the following process and it was approved by ACME for implementation.

Positions are created by either the VP of Human Resources or the Recruiting manager. When the position is created a reporting manager and recruiting manager are assigned. Positions have a status of open or closed and when created they are set to open. A position will be closed when a candidate is either hired or if a business decision is made to not hire. After a position is created new candidates will be matched to the position. Hopefully, many of these! Candidates can be updated by HR or by the hiring manager. The status of a candidate is tracked with a picklist field. Candidates are first reviewed and may move to either interview scheduled or declined. After a successful interview, an offer may be made. If accepted, they are hired, and the position is closed.

1. Create the following roles in your dev org (if you have not already).
2. VP Human Resources, reports to CEO
3. Recruiting Manager, reports to VP Human Resources
4. Dev Manager, reports to VP Development
5. Engineer, reports to Dev Manager

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| 1. Create the following objects and fields according to the table:

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| --- | --- | --- | --- |
| **Object** | **Fields** | **Type** | **Other** |
| Position | Description | Text Area |  |
|  | Max Salary | Currency (9,2) |  |
|  | Status | Picklist: Open, Closed | Restricted & Open is default |
|  | Hiring Manager | Lookup to User |  |
|  | Recruiting Manager | Lookup to User |  |
| Candidate | Position | Lookup to Position |  |
|  | Status | Picklist: Make Offer, Interview Scheduled, Declined, Hired, Review | Restricted, no default |
|  | Phone | Phone Number |  |
|  | SSN | Text 20 characters | Required and Unique |

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| Add good descriptions to the objects and fields! I find this helpful to both my current and future self. I have found adding descriptions as you create the object/fields can make the purpose clear in your own head. If you can’t create a good description of a field, perhaps it’s not needed! Check your objects with Schema Builder.  |
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| 1. Create tabs for your new custom objects (if you haven’t already) so records can be created.
2. Create the following profiles: Human Resources, Manager, Employee with object and field level access defined in the table. Create profiles based on the existing profile: ‘Standard User’

|  |  |  |  |
| --- | --- | --- | --- |
| **Object** | **Human Resources** | **Manager** | **Employee** |
| Position | Create, Read, Edit | Create, Read, Edit\* | Read (Max Salary hidden)  |
| Candidate | Create, Read, Edit | Read\* (SSN hidden) | Read\* (SSN hidden) |

\*Edit – Only allow editing of records of records the hiring manager has been assigned.\*Read – Only allow visibility of the candidate records for the manager who has the position assigned.***Question***: No one appears to have delete permission on our objects. Good thing or bad? Problems with this?1. Create new user accounts per table below\* and assign to profiles and roles. To simplify things the Recruiting Manager and the VP Human Resources can both have the same profile (Human Resources).

\*Sadly, the limit is two active users at a time for a Trailhead playground. So, as you create them you will then need to deactivate to be allowed to create more.1. Make a table to track users, profiles & roles and to aid in testing later. Give your users any name you wish.

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| --- | --- | --- | --- |
| **User** | **Role** | **Profile** | **Access permissions** |
| User1  | VP Human Resources | Human Resources | ? |
| User2 | Recruiting Manager | Human Resources | ? |
| User3 | Dev Manager | Manager | ? |
| User4 | Dev Manager | Manager | ? |
| User5 | Engineer | Employee | ? |

1. Time to create some records. First create a position record and then add a candidate. We want to test the system by logging in as our users to do this.

The ability to log in as another user needs to be enabled for Sys Admins. To do this go to Setup-> Logins -> click ‘Administrators Can Log in as Any User’. ***Pro Tip***: Having two different browsers installed will allow you to be logged in to two different accounts at the same time. 1. Activate the user with the role ‘VP Human Resources’. Then log in as this user and create a new position. Can we populate the lookup fields with the recruiting manager and hiring manager?
2. Deactivate this user and activate then login as the ‘Recruiting Manager’. Edit the position record the ‘VP Human Resources’ created and edit the ‘Recruiting Manager’ field. Add your ‘Recruiting Manager’ user to this field.
3. Deactivate the ‘Recruiting Manager’ and activate the ‘Dev Manager’ user. Attempt to edit the position record, can you? How can we get the right hiring manager in this field? We have a record access issue; how to solve?

Since Lightning has no manual sharing button, here is an option:appexchange:https://appexchange.salesforce.com/appxlistingdetail?listingId=a0N3A00000EFp0ZUAT |
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| 1. Create a permission set to allow the hiring manager to edit positions.
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Next Steps:

Traihead has a series of modules on building out a Recruiting App. I would encourage to explore these, just be aware there is an order of how they need to be done. You can see them here:

<https://trailhead.salesforce.com/en/search?keywords=Recruiting%20App>