



UNDERSTANDING DEFER SHARING CALCULATIONS

What is Defer Sharing Calculation?

Defer Sharing Calculation lets an administrator suspend and resume sharing calculations. This permission affects group membership calculation and sharing rule calculation. Performing a large number of configuration changes can lead to very long sharing rule evaluations or time outs. To avoid these issues, an administrator can suspend these calculations and resume calculations during an organization's maintenance period.

How can I enable Defer Sharing Calculation?

The Defer Sharing Calculation permission is not enabled by default. To enable Defer Sharing Calculation, please contact Salesforce.

When should I use Defer Sharing Calculation?

Administrators should plan to suspend/resume sharing calculations during maintenance windows to have minimal impact on users.

For example, you make large number of changes to criteria based sharing rules to allow access to specific groups and territories. Since sharing rule calculation is enabled by default, those sharing rule changes are evaluated immediately and can take a very long time to process and cause your organization to time out.

With Defer Sharing Calculation you can avoid this by suspending sharing rule calculations from evaluating immediately after you make sharing rule changes. You can resume sharing rule calculations during maintenance windows to have minimal impact on users.

What is Group Membership Calculation?


Group membership calculates access any time you make changes to:

- Roles
- Territories
- Groups
- Users
- Portal Account Ownership

Group membership calculation is enabled by default.


To suspend or resume group membership calculation:

1. From Setup, in the Quick Find box, enter *Defer Sharing Calculations*, and then select **Defer Sharing Calculations**.
2. In the Group Membership Calculations related list, click **Suspend**.

 **Note:** If sharing rule calculations are enabled, suspending group membership calculations also suspends sharing rule calculations. Resuming group membership calculations also requires full sharing rule recalculation.

3. Make your changes to roles, territories, groups, users, or portal account ownership.
4. To enable group membership calculation again, click **Resume**. Group membership recalculation begins automatically.

- To recalculate sharing rules, select **Yes** when asked if you want to automatically recalculate sharing rules. Or, in the Sharing Rule Calculations related list, click **Recalculate**.

 **Important:** After you resume group membership calculations, you must do a full sharing rule recalculation. Otherwise, changes that you made while calculations were suspended aren't reflected in your sharing rules.

What is Sharing Rule Calculation?

Sharing rule calculates access any time you:

- Change an organization's default sharing model
- Create, edit, or delete sharing rules
- Create or transfer any records
- Update public group members
- Create or activate a user
- Change or re-parent roles
- Add or remove users from territories
- Re-parent territories
- Make changes to roles, territories, or public groups participating in sharing rules


Sharing rule calculation is enabled by default.

To suspend, resume, or recalculate sharing rule calculation:

- From Setup, in the Quick Find box, enter *Defer Sharing Calculations*, and then select **Defer Sharing Calculations**.
- In the Sharing Rule Calculations related list, click **Suspend**.
- Make changes to sharing rules, roles, territories, or public groups participating in sharing rules.

 **Note:** Any changes to sharing rules require a full recalculation.

- To enable sharing rule calculation again, click **Resume**.
- To manually recalculate sharing rules, click **Recalculate**.

 **Important:** After you resume sharing rule calculations, you must click **Recalculate** to do a full sharing rule recalculation. Otherwise, changes that you made while calculations were suspended aren't reflected in your sharing rules.

The sharing rule recalculation process may take a very long time depending on the size of the organization and the number of changes performed.

When do I have to recalculate my sharing rules?

Recalculate only if your sharing rule updates have failed or aren't working as expected, or if you have deferred (suspended and resumed) sharing rule calculations.

What happens when I suspend Group Membership or Sharing Rule Calculations?

When you suspend group membership or sharing rule calculations, sharing evaluations are disabled. Any configuration changes made to groups or sharing rules will not take effect until you resume and recalculate group membership and sharing rules.

Notification emails are sent to the administrator ONLY when group membership calculation and sharing rule recalculation is complete, respectively.

How can I view the current Sharing status?

All sharing related changes are logged in the audit trail, including when an administrator suspends, resumes, or recalculates sharing calculations.

To view setup audit trail

1. From Setup, enter *View Setup Audit Trail* in the *Quick Find* box, then select **View Setup Audit Trail**.
2. To download your organization's full setup history for the past 180 days, click the **Download** link.

View Setup Audit Trail			
Date	User	Action	Section
5/31/2011 4:30:20 PM PDT	yourname@yourcompany.org	Resumed sharing rule calculations	Sharing Rules
5/31/2011 4:30:20 PM PDT	yourname@yourcompany.org	Started recalculation of sharing rules for all entities	Sharing Rules
5/31/2011 4:30:20 PM PDT	yourname@yourcompany.org	Completed recalculation of sharing rules for all entities	Sharing Rules
5/31/2011 4:30:17 PM PDT	yourname@yourcompany.org	Suspended sharing rule calculations	Sharing Rules