UNDERSTANDING USER SHARING

Summary

User Sharing controls access to user records. You can use the "View All Users" permission to grant a user Read access to all user records, regardless of the sharing settings. System administrators and users with the "Manage Users" permission automatically get the "View All Users" permission with User Sharing.

What is User Sharing?

Note: User Sharing is automatically available in new organizations in Winter '14. Existing organizations can contact Salesforce to enable this feature.

User Sharing enables you to show or hide an internal or external user from another user in your organization.

With User Sharing, you can:

- Assign the "View All Users" permission to users who need to see or interact with all users. This permission is automatically enabled for users who have the "Manage Users" permission.
- Set the organization-wide default for user records to Private or Public Read Only.
- Create user sharing rules based on group membership or other criteria, such as username and whether a user is active.
- Create manual shares to grant access to individual users or groups.
- Control the visibility of external users in customer or partner portals and communities.

Understanding User Sharing

Review these considerations before you implement user sharing.

Granting access to a user record makes the user's detail page visible to others. It also makes the user visible in lookups, list views, search, and so on.

"View All Users" permission

This permission can be assigned to users who need Read access to all users, regardless of the sharing settings. If you already have the "Manage Users" permission, you're automatically granted the "View All Users" permission.

Organization-wide defaults for user records

This setting defaults to Private for external users and Public Read Only for internal users. When the default access is set to Private, users can only read and edit their own user record. Users with subordinates in the role hierarchy maintain read access to the user records of those subordinates.

User sharing rules

General sharing rule considerations apply to user sharing rules. User sharing rules are based on membership to a public group, role, or territory. Each sharing rule shares members of a source group with those of the target group. You must create the appropriate public groups, roles, or territories before creating your sharing rules. Users inherit the same access as users below them in the role hierarchy.

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Understanding User Sharing

Manual sharing for user records

Manual sharing can grant read or edit access on an individual user, but only if the access is greater than the default access for the target user. Users inherit the same access as users below them in the role hierarchy. Apex managed sharing isn't supported.

User sharing for external users

Users with the "Manage External Users" permission have access to external user records for Partner Relationship Management, Customer Service, and Customer Self-Service portal users, regardless of sharing rules or organization-wide default settings for User records. The "Manage External Users" permission doesn't grant access to guest or Chatter External users.

High-volume Experience Cloud site users and Chatter users

Only users with roles can be included in sharing rules. For this reason, the user records of high-volume users, Chatter External, and Chatter Free users can't be included in sharing rules, and these users can't be granted access to user records via a sharing rule.

Automated Process and License Manager users

Some special users created for org or app maintenance, such as Automated Process and License Manager users, can't be included in any sharing rules, including user sharing rules.

User sharing compatibility

When the organization-wide default for the user object is set to Private, user sharing doesn't fully support these features.

- Chatter Messenger isn't available for external users. It's available for internal users only when the organization-wide default for the user object is set to Public Read Only.
- Salesforce CRM Content—A user who can create libraries can see users they don't have access to when adding library members.
- Standard Report Types—If the organization-wide default for the user object is Private and the Standard Report Visibility checkbox is selected, a person viewing the report can see the names of users that are listed in the report. To see details such as username and email address, the viewer must have access to the users.

User sharing in Chatter

In Chatter, there are exceptions where users who aren't shared can still see and interact with each other. For example, regardless of user sharing, in a public Chatter group, everyone with access to the group can see all posts. They can also see the names of the users who post and mention users who commented on a post.

For example, you set up user sharing so Mary and Bob can't see or interact with each other. Mary posts on a public Chatter group. She can't mention Bob, because user sharing prevents Bob's name from showing

up in the mention dropdown list. However, Bob can see Mary's post and he comments on her post. Now Mary can actually mention Bob in her next comment on her post.

There are also exceptions where users who aren't shared can still see each other in the mention dropdown list. For example, Sue has interacted with Edgar in Chatter (by liking or commenting on his post or mentioning him). Then you set up user sharing so Sue can't see Edgar. Sue posts on a public Chatter group. She can mention Edgar because, due to their previous interaction, his name shows up on the mention dropdown list. However, if Sue clicks the Edgar mention, she gets an error because, due to user sharing, she can't see him.

Organization-Wide Defaults for User Records

For user records, you can set the organization-wide sharing default to Private or Public Read Only. The default must be set to Private if there is at least one user who shouldn't see a record.

Let's say that your organization has internal users (employees and sales agents) and external users (site or portal users) under different sales agents or accounts, with these requirements:

This table explains what it means to have Read access on a user record.

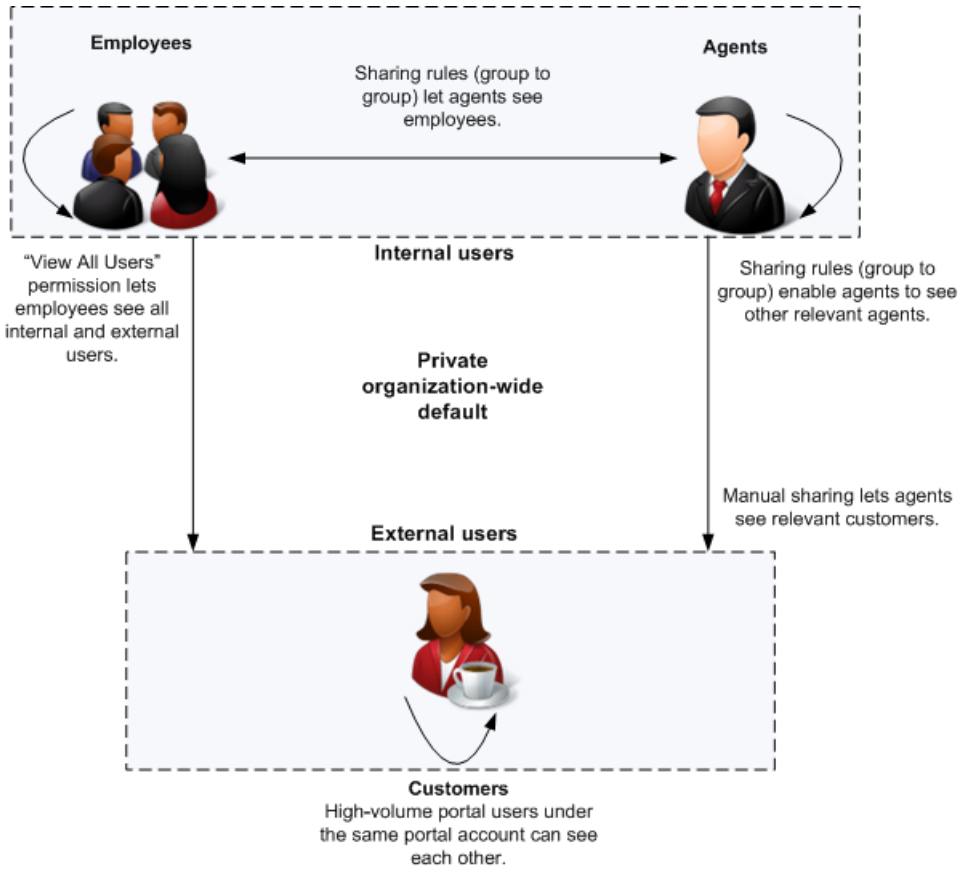
Read access to the record?	What can you see?
No	User's name only.
Yes	User's name, profile, and detail page. You can also see the user in lookups, list views, ownership changes, user operations, and search. Internal users with Read/Write access can edit the record, excluding fields such as role, profile, or permissions. Portal users can't edit user records.

This graphic illustrates how the organization-wide defaults work with sharing rules, manual sharing, and the "View All Users" permission.

Tip

Regardless the organization-wide defaults:

- Administrators and users with the "View All Users" permission retain Read access to all user records.
- Internal users have Read/Write access to their own records.
- Users have Read access to user records below them in the role hierarchy.



Setting the Organization-Wide Defaults for User Records

Permissions

You'll need the "Manage Sharing" permissions to set the organization-wide defaults.

When the feature is first turned on, the organization-wide default is Public Read Only for internal users and Private for external users.

To set the organization-wide defaults:

1. From Setup, in the Quick Find box, enter `Sharing Settings`, then select **Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Select the default internal and external access you want to use for user records.

   The default external access must be more restrictive or equal to the default internal access.
4. Click **Save**.

   Users have Read access to those below them in the role hierarchy and full access on their own user record.

When do I need to use user sharing rules or manual shares?

Tip

Users inherit the same level of access as users below them in the role hierarchy.

You can't grant a more restrictive access than your organization-wide defaults. If a user gains access to a record by more than one way (for example, organization-wide defaults and sharing rules), the higher level of access is maintained.

User sharing rules grant additional access beyond the organization-wide defaults, based on group membership (role, groups, or territories) or other criteria. User sharing rules based on membership enable user records belonging to members of one group to be shared to members of another group.

Manual sharing grants additional access to user records, but on an individual basis. For example, you can use manual sharing in these examples:

- You want to share your user record on a one-time basis.
- You want to extend access to your user record to an individual user below you in the role hierarchy.
- You're extending access to external users such as high-volume portal or guest users so that internal users may see them.

Note: You can extend access to High-volume portal users and guest users using manual shares, but not sharing rules, since they don't have roles. High-volume portal users can be shared with internal users via manual sharing, but not the other way around. Guest users can be shared with internal users via manual sharing, and vice versa.

Creating User Sharing Rules

Permissions

You'll need the "Manage Sharing" permission to create sharing rules.

User sharing rules can be based on membership to public groups, roles, or territories, or on other criteria such as Department and Title. By default, you can define up to 300 user sharing rules, including up to 50 criteria-based sharing rules.

To create user sharing rules:

1. From Setup, enter *Sharing Settings* in the Quick Find box, then select **Sharing Settings**.
2. In the User Sharing Rules related list, click **New**.
3. Enter the **Label Name** and click the **Rule Name** field to auto-populate it.
4. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
5. Select a rule type.
6. Depending on the rule type you selected, do the following:
   - Based on group membership—Users who are members of a group can be shared with members of another group. In the Users who are members of line, select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 groups, roles, or territories).
   - Based on criteria—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.

     Note: To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.

7. In the `Share with` line, specify the users who get access to the user records. Select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
8. Select the sharing access settings for users.

Access Setting	Description
Read Only	Users can view, but not update, records.
Read/Write	Users can view and update records.

9. Click **Save**.

Creating Manual Shares for User Records

Permissions

You can share your own record to another user for whom you have Read access, or you can share any record if you have the "Manage Users" permission.

To grant access to a user record:

1. From Setup, enter *`Users`* in the `Quick Find` box, then select **Users**. Click the name of the user you want to share.
2. On the User Detail page, click **Sharing**.
3. Click **Add**.
4. From the drop-down list, select the group, user, role, or territory to share with.
5. Choose which users have access by adding them to the Share With list.
6. Select the access level for the record you are sharing.

   Possible values are Read/Write or Read Only, depending on your organization-wide defaults for users. You can only grant a higher access level than your organization-wide default.
7. Click **Save**.
8. To change record access, on the user's Sharing Detail page, click **Edit** or **Del**.