

Using Roles for Calendar Sharing

Setup → Manage Users → Roles

Create two Roles:

1. Name “Calendar Delete” Role in which is the highest Role and Reports to “None”; shares with Role and Subordinates
2. Name “No Event Delete” Role is the second tier and Reports To “Calendar Delete” and shares with Role and Subordinates

Be sure to check the box:

- Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities

When finished your Roles should look something like this:

Creating the Role Hierarchy

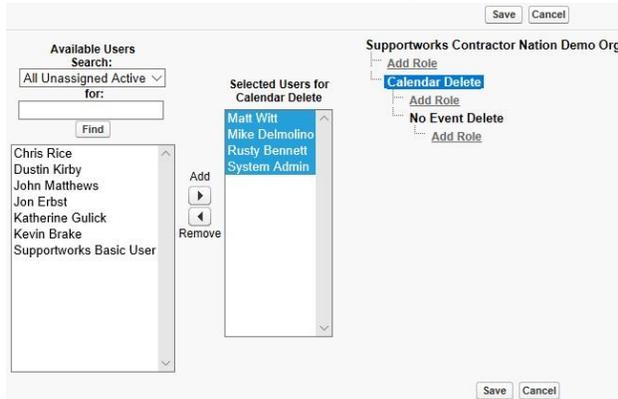
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy



Click “Assign” to Assign Users to each Role

In the Available User Search menu, choose “All Unassigned Active” list.



Add individuals who should be able to Delete Calendar Events to the “Calendar Delete” Role. In the example above, Matt, Mike, Rusty and the Admin will be able to Delete Events from the Calendar.

Assign Users who should NOT be able to Delete Calendar Events to the “No Event Delete” Role. In this example, Chris, Dustin, John, Jon, Kevin and Katherine will be unable to move or delete Calendar Events (for other Users). The Users in the “No Event Delete” Role CAN create, edit and delete Events for themselves.

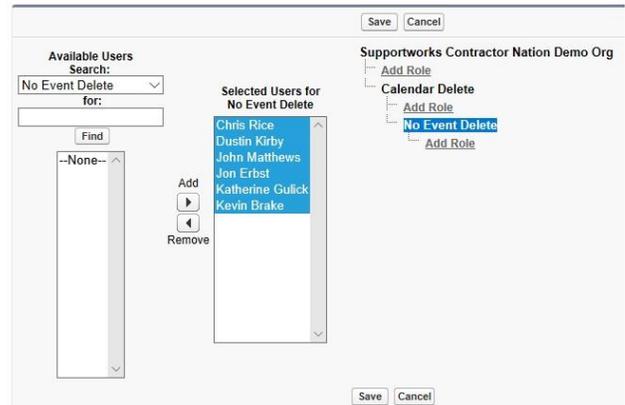
Roles No Event Delete

The users shown in the Selected Users list are currently assigned to the role No Event Delete.

To assign other users to this role:

- Make a selection from the drop-down list to show available users.
- Choose a user on the left and add them to the Selected Users list.

Removing a user from the Selected Users list deletes the role assignment for that user.



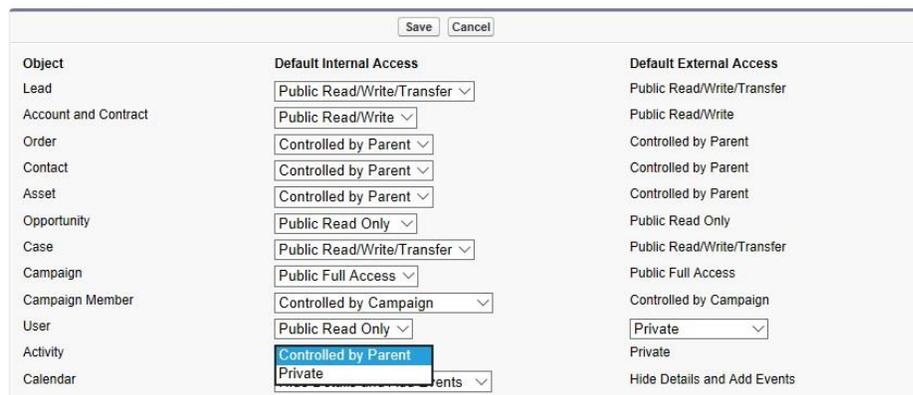
The screenshot shows a web interface for managing roles. On the left, there is a search box for 'Available Users' with a dropdown menu set to 'No Event Delete'. Below it is a 'Find' button and a list of available users (currently empty). In the center, there is a list of 'Selected Users for No Event Delete' containing: Chris Rice, Dustin Kirby, John Matthews, Jon Erbst, Katherine Gulick, and Kevin Brake. There are 'Add' and 'Remove' buttons between the two lists. On the right, a role hierarchy is shown for 'Supportworks Contractor Nation Demo Org', with 'Calendar Delete' and 'No Event Delete' roles visible. 'Save' and 'Cancel' buttons are present at the top and bottom of the interface.

Once you’ve completed the setup steps, Test your Roles!

1. As the System Administrator, create two Events on the Calendar. Assign one Event to a User in the “Calendar Delete” Role and assign one Event to a User in the “No Event Delete” Role. For this example, I create one Event for Matt Witt and one Event for Kevin Brake.
2. Login as a User with the “Calendar Delete” Role. Go to the Staff Calendar and locate the Event scheduled for the User in the “No Event Delete” Role. In this example, I logged in as Matt and looked for the Event on Kevin’s schedule. Delete the Event. You should be able to Delete the Event.
3. Login as a User with the “No Event Delete” Role. Go to the Staff Calendar and locate the Event scheduled for the User in the “Calendar Delete” Role. In this example, I logged in as Kevin and looked for the Event on Matt’s schedule. Try to delete the Event. You should receive an insufficient privileges error message and NOT be able to Delete the Event.

Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults. Changing these defaults will cause all sharing rules to be recalculated. This could require signification of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and at



The screenshot shows a table with three columns: Object, Default Internal Access, and Default External Access. The 'Activity' row is highlighted, and its 'Default Internal Access' is set to 'Controlled by Parent' and 'Default External Access' is set to 'Private'. The 'Calendar' row has 'Default Internal Access' set to 'Private' and 'Default External Access' set to 'Hide Details and Add Events'. Other rows include Lead, Account and Contract, Order, Contact, Asset, Opportunity, Case, Campaign, Campaign Member, and User.

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer
Account and Contract	Public Read/Write	Public Read/Write
Order	Controlled by Parent	Controlled by Parent
Contact	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read Only	Public Read Only
Case	Public Read/Write/Transfer	Public Read/Write/Transfer
Campaign	Public Full Access	Public Full Access
Campaign Member	Controlled by Campaign	Controlled by Campaign
User	Public Read Only	Private
Activity	Controlled by Parent	Private
Calendar	Private	Hide Details and Add Events

Optional Setup – Would you ever want a User in the “No Event Delete” Role to be able to MOVE Events on the Calendar? For example, Kevin has scheduled a meeting with Matt and needs to move the meeting to a different date or time. You can grant Users the ability to Edit Events that they created by changing the Sharing Settings for the Activity object. Here’s how:

Setup→Security Controls→Sharing Settings→Edit

Change the picklist value for “Activity” from Private to “Controlled by Parent.” This setting will allow the User who created the Event to Edit that Event. The User who created the Event is considered the “Parent.”