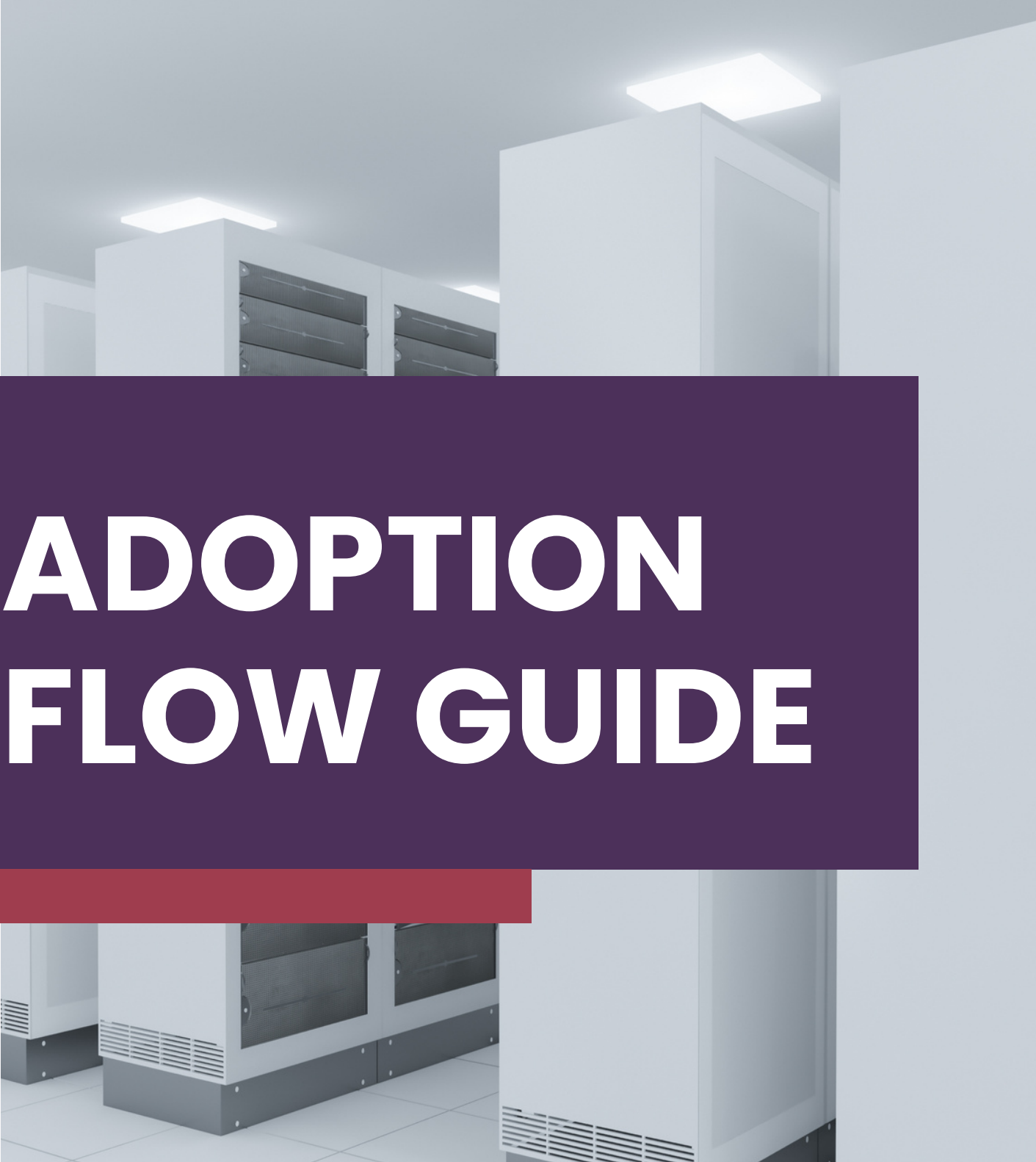




SPECIALIZATION
MANAGER

The background of the cover is a photograph of a server room. It shows several tall, white server racks with glass doors, some of which are open, revealing internal components. The room is lit by square ceiling lights, and the floor is a light-colored tile.

ADOPTION FLOW GUIDE

**Recommended Specialization Manager
adoption flow**

RATIONAL  **CLOUD**

STEP 0

Optional: Read the user guide, Install SM in a test sandbox, test your personal use cases, and make a decision to adopt SM and an adoption plan.

STEP 1

Install SM in the developer Sandbox or any sandbox where development is happening (development sandbox).

Install SM in Salesforce Production org.

See our Installation and configuration guide for details.

Optional: If your company uses CI/CD and has a chain of sandboxes leading to production deployment – additionally install SM in all sandboxes on the production deployment path.

STEP 2

Understand user access archetypes that your company is using or plans to use past SM adoption.

Document these archetypes.

Optional: Identify and document a key user that represents each security archetype for the next step. See User Guide for details.

STEP 3

Configure your organization's Specializations in the development sandbox. The proper and easiest way to do this is to use the "Create from User" functionality on each user representing an archetype identified in Step 2.

Alternatively – each Specialization representing an archetype can be configured manually. See User Guide for details.

STEP 4

Deploy resulting metadata in the Full sandbox used for testing.

Optional: It is recommended to test each Specialization on 1-2 records.
Make sure provisioned users have the desired configuration.

Optional: For smaller companies not having a full sandbox – skip this step.

STEP 5

Use built-in Specialization assignment to assign Specializations to your entire user base.

Optional: Built-in Specialization assignment is made for small companies or incremental updates and is not designed for initial configuration in large companies.

If your company exceeds **200–500 users** we recommend making assignments in bulk in a .csv file and uploading it via Salesforce dataloader (only data load Id and Specialization__c fields on the User object).

Important: Dataloader initiated assignments do not apply (assign fields/permissions) the specializations.

Once dataloaded is completed you would need to use the Assign button on each affected specialization and wait for batch processes to complete.

STEP 6

Use a built-in scanner to make sure your entire user base is covered and all specializations are applied correctly.