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Overview

Get the benefits of Chatter while ensuring that all necessary governance requirements are met. Compliance Locker employs best practices for capturing Chatter for compliance purposes, allowing administrators to customize settings for tracking, storing, and reporting on Chatter posts and comments in a meaningful way for governance officers.

- Capture all Chatter posts and comments within the Chatter Compliance custom object
- Send Chatter Compliance records to an email inbox (including attachments)
- Set data retention policies for how long you want to keep compliance records and Chatter feed activity
- Drive compliance with users by blocking prohibited words from being posted
- Archive existing Chatter activity to grab any Chatter before Compliance Locker was installed

Every time a user posts to a Chatter feed on their user profile, or any record within Salesforce, it is automatically captured within the Chatter Compliance custom object. The application captures all Chatter Feeds, logs deletion of posts, allows administrators to determine “blacklisted” words, and has customizable retention settings.

Stay compliant while giving your users access to the power of Chatter.

The application can be downloaded and installed from the AppExchange at address below.

Compliance Locker on the AppExchange

<http://appexchange.salesforce.com/listingDetail?listingId=a0N300000055jc5EAA>

Technical Requirements

Salesforce.com Supported Versions: Enterprise Edition, Unlimited Edition, Developer Edition

Support

For support related to Compliance Locker, you can email support@arkusinc.com or [@ArkusSupport](https://twitter.com/ArkusSupport) on Twitter with any questions or issues.

Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install Compliance Locker, follow the instructions below.

1. Navigate to the link below in your browser and click **Get It Now**.

<http://appexchange.salesforce.com/listingDetail?listingId=a0N300000055jc5EAA>

2. You are prompted to see if you have a Salesforce account, are a system administrator, and in which environment you want to install Compliance Locker. We recommend that you install Compliance Locker to your Sandbox environment to test and evaluate the application before installing the package in your production environment. Click **Continue**.



The screenshot shows the Salesforce AppExchange listing for 'Compliance Locker'. At the top, there is a large graphic with a padlock icon and the text 'COMPLIANCE LOCKER' in green and black, followed by 'Captures All Posts, Deletions, Files'. Below this, the app's name 'Compliance Locker' is displayed with its description and a 4-star rating. To the right, there are social media links for Email, Like (4), and Tweet (14). A navigation bar at the bottom of the header includes 'Overview', 'Details', 'Reviews' (with a blue tab), and 'Provider'. On the far right of this bar are 'Save' and 'Get It Now' buttons. The main content area asks 'How would you like to continue?' and provides two options: 'Install in production' (which includes active, trial, or developer orgs) and 'Install in sandbox' (which is for testing in a copy of the production org).

3. Confirm that you have read the Terms & Conditions, and click **Install**. You will be prompted to verify your password before the Compliance Locker package begins the installation process.

4. The Package Details Page provides you with a detailed list of all components included in the Compliance Locker package. Click **Continue**.

Package Installation Details

[Help for this Page](#) ?

Package Name	Compliance Locker by Arkus
Version Name	2.1
Version Number	2.1 (Beta 8)
Publisher	Arkus, Inc
Description	

[Continue](#) [Cancel](#)

Package Components

- ▶ Pages (2)
- ▶ Apps (1)
- ▶ Objects (6)
- ▶ Code (27)
- ▶ Resources (25)
- ▶ Fields (87)
- ▶ Tabs (4)

Remote Access

No records to display

5. Review the object permissions in Step 1 of the installation and click **Next**.

Compliance Locker by Arkus

Step 1. Approve Package API Access**Step 1 of 3**

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

[Next](#) [Cancel](#)

6. Choose the security level in Step 2 of the installation. We recommend that you **Grant access to admins only**, as Compliance Locker is used for logging and documenting Chatter activity by compliance officers or system administrators. Click **Next**.

Compliance Locker by Arkus

Step 2. Choose security level**Step 2 of 3**

Select security settings:

☒ Grant access to admins only Users with your profile get full access (best for limited deployments)

☐ Grant access to all users All internal custom profiles get full access

☐ Select security settings User access set by profile (recommended for most packages)

[Previous](#) [Next](#) [Cancel](#)

7. **Check the box** in Step 3 of the installation to ignore Apex test failures. Click **Install** to start installing the package into your Salesforce environment.

Step 3. Install Package

Step 3 of 3

The package is ready to be installed. Click Install to continue.

☒ Ignore Apex test failures that may cause the installed application not to function properly.

Previous

Install

Cancel

8. After the installation occurs, you will see the Install Complete page notifying you that package installed correctly. You may choose whether to **Deploy Now** or **Deploy Later**; we suggest to **Deploy Now** so you may begin configuring the application in your environment.

Package Details

Help for this Page ?

Compliance Locker by Arkus (Managed)

« Back to List: Installed Package

Install Complete
Follow any remaining steps in the app install guide to complete deployment.

Uninstall

View Components

View Dependencies

Package Name	Compliance Locker by Arkus	Version Number	2.1 (Beta 8)
Language	English	Package Type	Managed
Version Name	2.1	API Access	Unrestricted [Enable Restrictions]
Namespace Prefix	chatcomp	Modified By	Staci Rice , 9/15/2012 8:35 AM
Publisher	Arkus, Inc		
Description	Compliance for Chatter by Arkus package.		
Installed By	Staci Rice , 9/15/2012 8:35 AM		

Provide Arkus Feedback

If you would like to provide feedback about Compliance Locker, please send us an email to support@arkusinc.com or [@ArkusSupport](https://twitter.com/ArkusSupport) on Twitter with your comments. We are continually building upon Compliance Locker to increase its functionality and usefulness.

If you are interested in learning more about Arkus and additional applications that we have developed, view the link below.

<http://www.arkusinc.com/products/>