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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

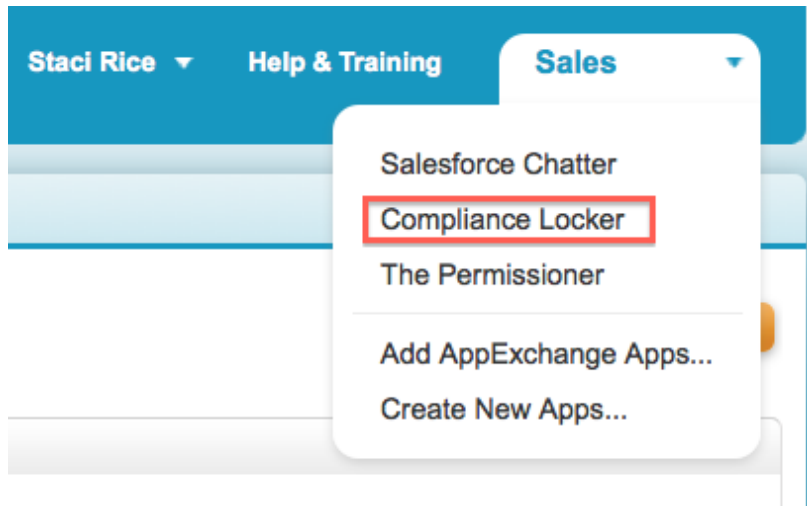
<http://appexchange.salesforce.com/listingDetail?listingId=a0N300000055jc5EAA>

First-Time Setup of Compliance Locker

After installing Compliance Locker, you will need to configure the application for use within your environment. Follow the steps below to begin using Compliance Locker.

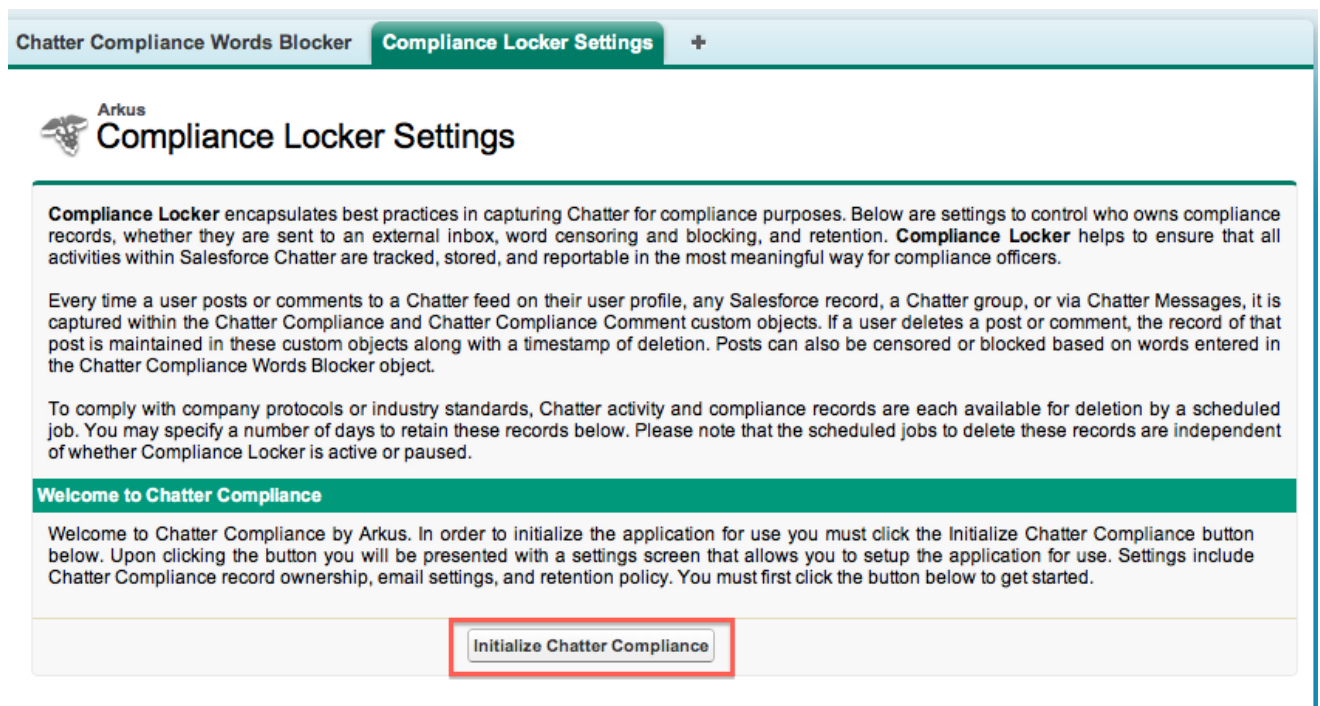
1. Navigate to the app

From the application dropdown, select Compliance Locker.



2. Setup and Initialization

Click the **Compliance Locker Settings** tab. You will find a short description about the product. When ready to start using Compliance Locker, go to the bottom of the page and click **Initialize Compliance Locker**.



Go to **Runtime Settings** section where you will find a “Pause” and “Resume” button. This

allows you to pause or resume the logging of Chatter activity in your org. If you select Pause, all Chatter activity will cease to be logged and word blocking will be disabled. When you Resume, all activity configured will be enabled again.

Go to the **Owner & Compliance Email Integration** section and select an owner for all Chatter Compliance records. The owner may be either a user or queue. You may also specify an email address that will receive an email for every Chatter post and any included attachments. You may choose to pause and resume tracking with the buttons.

Go to **Word Censoring & Blocking** section to specify settings for banned words. You can choose to replace banned words with a set value, prevent the entire post from being created, or allow all posts. If you have enabled the banned word functionality, you will also need to set up your banned words – see step 4 below.

Word Censoring & Blocking

Compliance Locker can censor words or block their posts entirely based on words specified as records in the Chatter Compliance Words Blocker object. It is recommended that words are entered using the Custom Object Import Wizard or Apex Data Loader. Additionally, if a post with a banned word appears, a special email can be sent to the compliance inbox address specified above in the Owner & Compliance Email Integration section.

☐ Do not block any word

☒ Replace banned words with characters

☐ Show an error message

Please write a value:

Send an email notification if a banned word is in the post and no error message is displayed ☒

Based on the word blocking settings above, notification emails can be sent to the compliance inbox if a post is censored, or if word blocking is disabled, an email can be sent to the compliance inbox that a blocked word was posted.

Go to **Chatter Messages Archiving** allows you to determine how often (hourly or daily) the Chatter Compliance records are logged.

Go to the **Chatter Feed Retention** section if your company requires Chatter activity to be held for a specific number of days. By default, this field is blank and will retain all Chatter feed activity. If you do enter a number of days to retain the Chatter posts and comments, Chatter posts and comments will be deleted from Salesforce after that number of days.

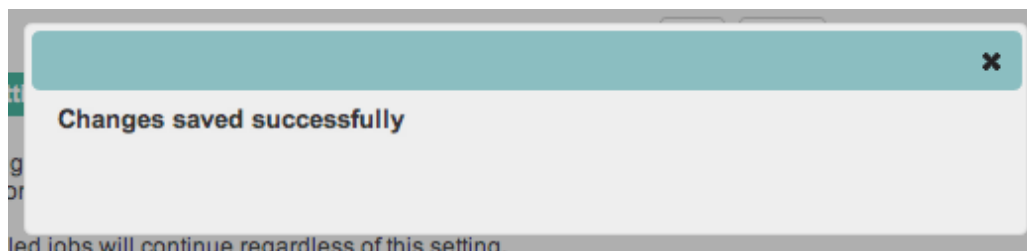
Go to the **Chatter Compliance Record Retention** section if your company requires the compliance records generated by Compliance Locker to be held for a specific number of days. By default, this field is blank and will retain all compliance records. This may affect your storage usage if you have a high volume of Chatter activity. If you do enter a number of days to retain the compliance records, the compliance records will be deleted from Salesforce after that

number of days.

Go to **Archiving Compliance Blackouts** to archive Chatter activity that has not been logged as Chatter Compliance records. The “Blackout Period”, for example, would be a period of time where the application was “Paused”, or the time period prior to installing and enabling Compliance Locker.

3. Save

Click **Save** when you have finished configuring the settings. You should see a window stating the “Changes saved successfully”.

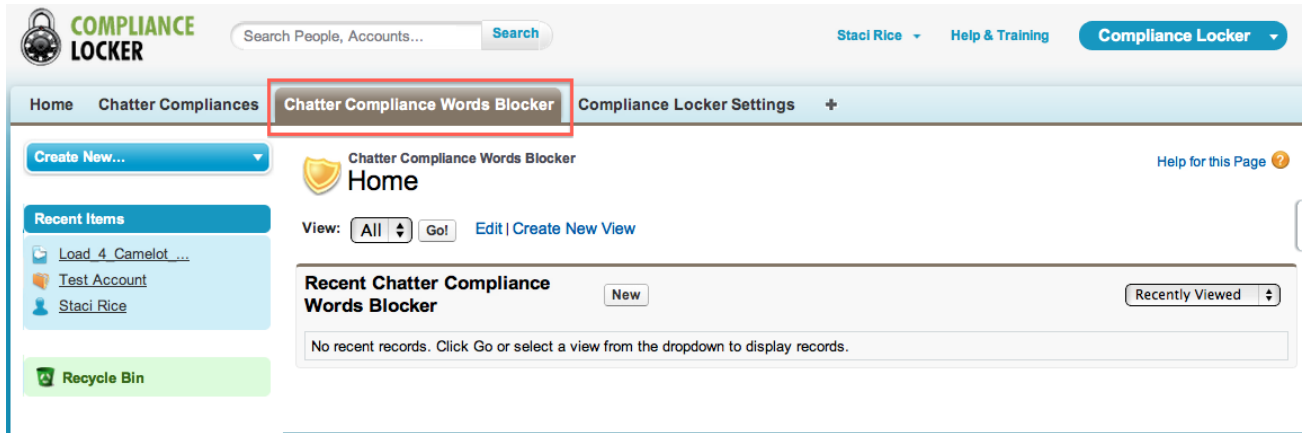


4. Word Blocking

If you have enabled **Word Censoring & Blocking** you will need to create a record for each banned word or Regular Expression. Go to the **Chatter Compliance Word Blocker** tab and create “New” to create a record for each word that should be banned from all Chatter activity. Add or remove blocked words as needed by adding and removing these records.

Regular Expressions

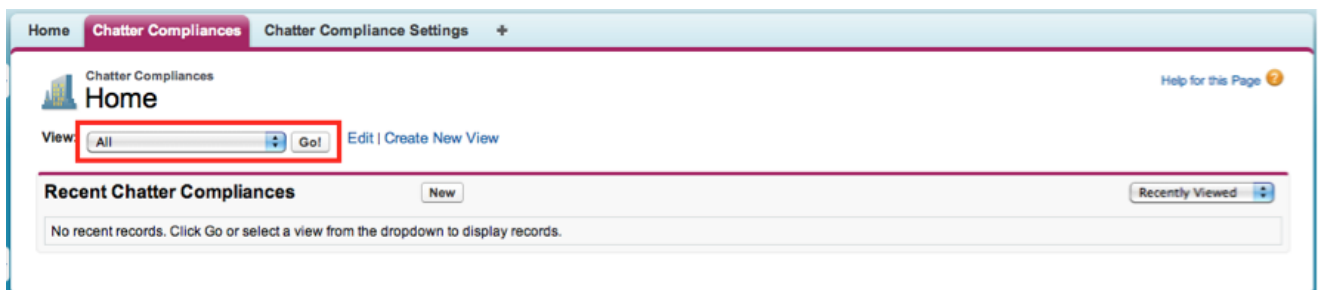
[Regular Expressions \(REGEX\)](#) can be added to block variations of a word or phrase without having to enter every variation as an individual word blocking record. For example, the Regular Expression “(?i)that\’s wack ” will block the following strings: ‘Thats wack’, ‘That’s wack’, ‘thats Wack’, ‘ThAt’s WaCk’, etc...



Using Compliance Locker

As your organization uses Chatter, posts, comments, and files will be tracked in Compliance Locker. To view these, click the Compliance Locker tab to access these records. Select the **All** view or click **Go** if it is already selected. By default, the application has the following views preconfigured:

- All
- All Deleted Posts
- Last 7 Days
- Last 7 Days - Attachments
- Last 7 Days - Deleted
- Today's Posts



Views return lists of Chatter Compliance records. A Chatter Compliance record is created when a user within your organization creates a Chatter post. To drill down to view post content, attachments, and comments, click on an individual record.

Action	ChatterCompliance N...	Related To	Post Created Date	Delete	Delete Date	Files Attached	User
Edit Delete	CC-0000	Roger Mitchell	6/14/2011 7:26 AM	<input type="checkbox"/>		<input type="checkbox"/>	Roger Mitchell

On the record detail page, comments to the original Chatter post are displayed in the **Chatter Compliance Comments** section. Any attachments included on the original Chatter post will appear in the **Notes & Attachments** section. You can also view details about the date and time that each change occurred.

Frequently Asked Questions

Actions on Chatter and Chatter Compliance records

Q: Does Compliance locker share my data with Arkus or anybody else?

A: No, All data generated by Compliance Locker is contained within your Salesforce instance.

Q: Compliance Locker is installed, but no Chatter Compliance records are being generated; what is happening?

A: You have to initialize Compliance Locker on the Compliance Locker Settings tab.

Q: When Arkus Compliance Locker is initialized, does it create Chatter Compliance records for the old posts?

A: No, only posts after initialization will be tracked.

Q: What happens when a user creates a post in Chatter when Compliance Locker is initialized?

A: A Chatter Compliance record is created with a reference to the original post, the user that created it, date it was created and a copy of the post content.

Q: What happens when a user adds a comment to a post in Chatter when Compliance Locker is initialized?

A: A comment on the Chatter Compliance record of the post is added with the comment content. If the Chatter Compliance record was deleted or was never created (because Compliance Locker was not initialized when the post was created or the retainment policy deleted it), then Compliance Locker will keep no track of the comment.

Q: What happens if the Chatter post has a link when Compliance Locker is initialized?

A: A Chatter Compliance record is created with a reference to the original post and a copy of the link.

Q: What happens if the post is an attachment and Compliance Locker is installed and initialized?

A: If the attachment of a Chatter post is under 5MB, a copy of the file will be attached to the Chatter Compliance record. But if the attachment exceeds that limit, the file will not be attached to the Chatter Compliance record and instead the “Files attached exceeded limit” field will be checked. In either case, a link to the original file will be set in the “Attachment url” field. If the email option is set in the Compliance Locker Settings page, the attachment is also attached to the email sent out if the size of the attachment is under 5MB.

Q: If a user deletes a Chatter post or comment, does the associated Chatter Compliance record get deleted too?

A: No, the Chatter Compliance record is updated that the user deleted the post or comment and the date it was deleted. The Chatter Compliance record is deleted if you scheduled the process to clean up the Chatter Compliance records and set the retain policy to be of a certain amount of days. In this case, if the number of days specified have already passed for a post, the scheduled job deletes the Chatter Compliance record. If the option 'Delete feed item' is checked off the post is also deleted. The posts in case of deletion are deleted permanently, but the Chatter Compliance records are sent to the Recycle Bin.

Q: What happens to the attachments of a Chatter Compliance record when the post is deleted?

A: The Chatter Compliance record saves a copy of the attachment as long as the size of it does not exceed the 5MB. If the attachment size exceeds the 5MB, then the Chatter Compliance record does not save a copy of it and checks the “Files attached exceeded size limit” field to true. In both cases the Chatter Compliance record saves a link to the original file in the “Attachment URL” field. If the post is deleted, all the attachments of the post remain in Salesforce and they can still be accessed through the link in their respective Chatter Compliance records or the Files tab. If the file is deleted from the Files tab, any Chatter post or Chatter Compliance record referencing that file will not be deleted, but when the file is accessed through the Chatter post or Chatter Compliance record a message of “Data not available” will be displayed.

Q: If a user creates a post, can he/she access the corresponding Compliance Locker record?

A: No, only the owner defined in the Compliance Locker Settings page can access the Chatter Compliance records.

Q: How can a user keep track of Chatter Compliance records?

A: If you set an email address in the Compliance Locker Settings page, an email will be sent every time somebody creates a post or comment in Chatter. With these emails you can keep track of everything that Compliance Locker does. The attachments of the post will also be attached to the email when under 5MB.

Q: How can a user clean up old Chatter Compliance records?

A: In the Compliance Locker Settings page you can set up a scheduled job that purges Chatter Compliance records older than a certain number of days specified by the user. You may also set if you want to delete the corresponding post in Chatter as well. The posts are deleted permanently, but the Chatter Compliance records are sent to the Recycle Bin for 30 days.

Q: If a user edits a Chatter Compliance record, what happens to the corresponding Chatter post?

A: Nothing, but the Chatter Compliance record may no longer represent the actual status of the post. Any change in the Chatter Compliance record will be logged in the record History related list. We recommend to avoid editing Chatter Compliance records^[1].

Q: Why are there two Compliance Locker Comments related lists on a Chatter Compliance record?

A: The first related list, marked with a chalkboard icon, captures all Chatter comments made by Force.com Platform, Salesforce.com editions, and Chatter Only licenses. For users upgrading from a previous edition of Compliance Locker, this is the original related list included in releases from 1.5 and before. The second related list, marked with a gemstone icon, captures all Chatter comments made by users with Chatter Free or Chatter External licenses. These would include users that only have access to Chatter or Chatter Customer Groups respectively.

Q: Does Compliance Locker's word blocking feature block regular expressions?

A: Yes, the Compliance Locker now supports regular expressions. When adding a new word to block from the Chatter Compliance Words Blocker tab, you can select to either add a word or a regular expression.

Compliance Locker Settings tab

Q: What happens if the user selected as owner does not have read/write access to the Compliance Locker object?

A: The owner will not be set, and the previous value for the owner will remain. You will have to set the permissions for the profile of the user you want to choose before setting the owner.

Q: I want to select a queue as the user, but it does not appear in the lookup window. What is happening?

A: The queues retrieved by the lookup are queues that support the Compliance Locker object; so, if a queue does not appear when you look for it, the queue does not support the Compliance Locker object. Set the queue to support Chatter Compliance and the lookup will retrieve it.

Q: What happens if the email address field is not set?

A: No emails will be sent every time a user creates a post or a comment in Chatter.

Q: Emails are not sending to the address that I specified. What is happening?

A: The email entered in the Compliance Locker Settings page may be wrong. Also, there is a limit on the number of emails that a user can send in an org, so if a user creates a lot of posts and an email is sent out for each post, once the limit is reached no more emails will be sent out.

Q: What is the maximum number of days that a Chatter Compliance record can be kept?

A: There is no true maximum because the field is a standard Salesforce number field that will accept up to 16 digits, which can be several millennia.

Q: What happens if the user enters 0 in the days to retain the Chatter Compliance records?

A: The Chatter Compliance records will never be deleted, even if the scheduled job to clean up the records is set up. If the number of days is then edited, when the scheduled job runs, it deletes all Chatter Compliance records that were created before the number of days indicated (even if the records were created before the user changed the number of days).

Q: What happens if the user edits the values for the number of days to retain the Chatter Compliance records or the option to “Delete feed item”?

A: The new values will be immediately taken into account next time the scheduled job runs.

Q: What happens to old Chatter Compliance records when the owner is changed in the Compliance Locker Settings page?

A: All Chatter Compliance records (old and the new ones created from now on) will have the new owner set.

Q: The user unscheduled the process to delete the Chatter Compliance records, but when s/he tried to reschedule it, an error message states that the process already exists. What is happening?

A: After you unschedule the process you have to click on the “View Scheduled Jobs” link, navigate to the “Scheduled Jobs” item of the “Monitoring” menu in the org setup and manually delete the scheduled job called “Arkus Compliance Locker”.

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/>