



Permission Comparator

Permission Comparator evaluation Guide, 2024

This document is created for Salesforce administrator to evaluate the application. It will describe the steps to setup this application and how to perform basic scenarios.

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Contents

Document.....	2
Overview	2
Download and install package from AppExchange.....	3
Test Scenario -1 - Track Profile and Permission Set changes against the Baseline.	4
Test Scenario -2 – Accept or Reject the changes	6
Test Scenario -3 – Email the results	7
Test Scenario -4 – Automate Run comparator job and email results.....	8
Test Scenario -5 – Other Scenarios	9

Document

This document is created for Salesforce administrator to evaluate the application. It will describe the steps to setup this application and how to perform basic scenarios.

For more details, refer “Permission Comparator Guide v6” document.

Overview

The Permission Comparator application allows system administrators to quickly and easily spot unintended or unauthorized changes to Profiles and Permissions.

The Permission Comparator has the following features:

- Track Permission Set or Profile changes throughout the development lifecycle
- Ensure Permission Set and Profile changes destined for Production are visible and authorized before going to Production.
- Admins can compare Permission Set or Profile changes against a secure, custom configured baseline and either accept or reject changes which deviate from the baseline.
- Admins can schedule daily jobs to send alerts of any deviations from the custom configured baseline.
- Admins can compare two different profiles or Permission Sets to easily see the differences

- Admins can update custom created baselines updating them as the security and business requirements change over time.

This application is specifically designed for use by System administrators or security personnel.

Example use case

Consider a scenario where you have Sales Agent users located in EMEA and APAC region. EMEA Sales agents are allowed to work on EMEA accounts only and they should not have an access to APAC accounts. In a recent release, developers have accidentally provided 'Modify All' permission on the EMEA Sales Agent profile. Due to this unintended and unauthorized change, all EMEA Agents can suddenly access APAC accounts. This change went unnoticed and it is a violation of data privacy regulation. The Permission Comparator can notify specified admins or security personnel of such changes before they get released to Production thus avoiding a severe security policy violation and ultimate regulatory breach.

More specifically, an admin can define multiple baselines containing the approved permissions on EMEA sales agent's profile. The admins can schedule a profile comparison job which will run every day and email any changes to EMEA Sales Agent profile. This can be monitored by Admins and Security personnel as part of the Software Development Lifecycle.

Download and install package from AppExchange

While installing the package makes sure you select **"Install for Admins only"**.

Install Permission Comparator
By Techmindware

⚠ This app is protected by an installation key.

☒ **Install for Admins Only** ☐ Install for All Users ☐ Install for Specific Profiles...

⚠ You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install Cancel

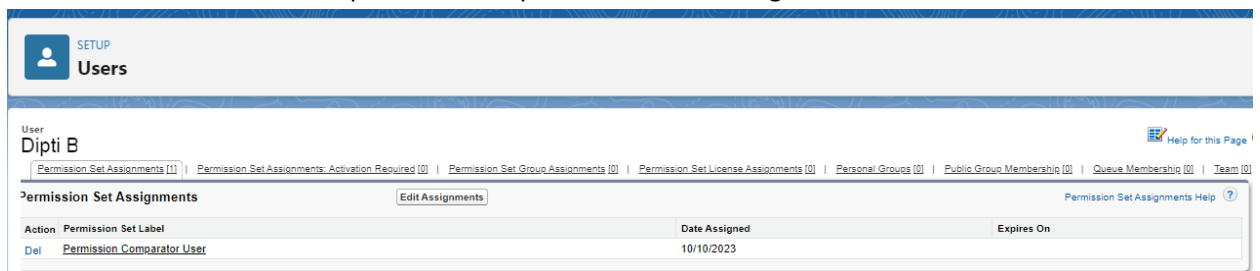
Test Scenario -1 - Track Profile and Permission Set changes against the Baseline.

Description - Admins can compare Permission Set or Profile changes against a secure, custom configured baseline and either accept or reject changes which deviate from the baseline.

Consider a scenario where you have multiple development teams are working on multiple projects and performing changes on common set of profiles and permission sets. As an Admin, you are worried about all changes to permissions which may leak your data. Thus you want to track the changes happening each of the sprints before it goes live on production. This tool provides this ability to track and notify the admin.

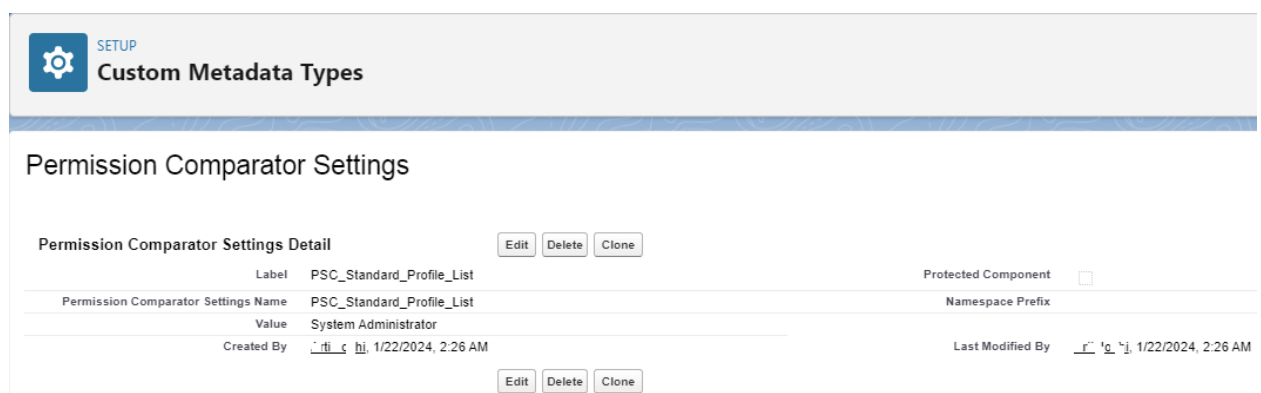
Prerequisites

1. Make sure only System administrator (user with System administrator profile) can use this application. It will not work for any other users.
2. Make sure "Permission Comparator User" permission set is assigned to the user



3. If you want to Track Standard profile changes, make sure following entry is present in custom metadata type "percomp__PSCComparator_Settings__mdt"

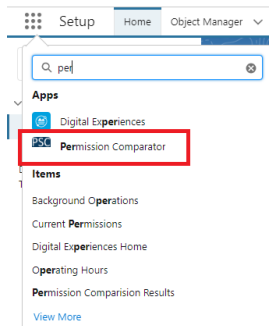
You can add multiple comma separated entries for Standard profiles



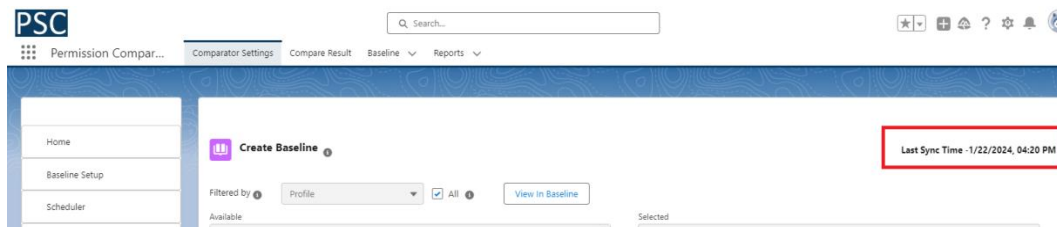
Steps to Reproduce

(A) Create Baseline – Create the baseline of Profiles and Permission Sets of your org.

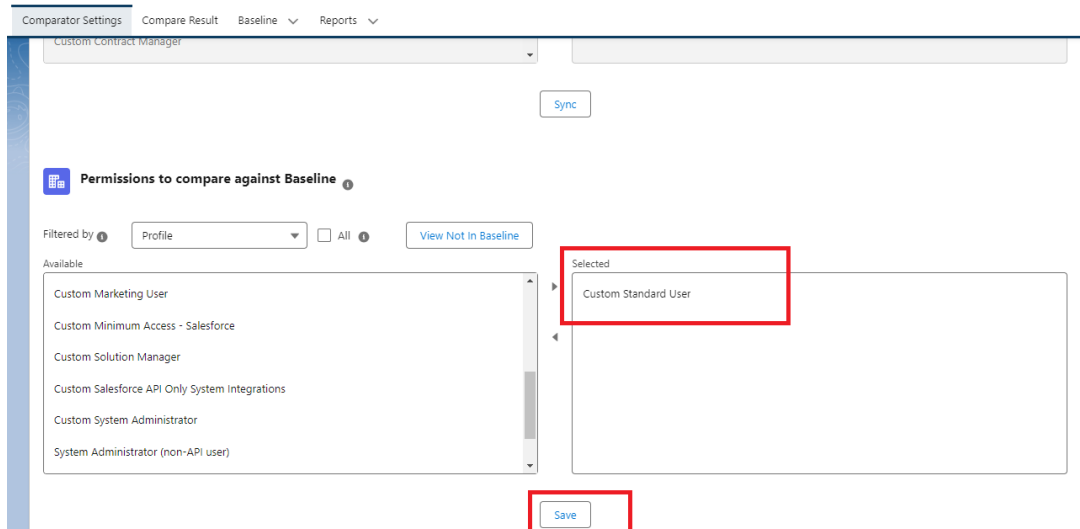
1. Go to App Navigator and Search for “Permission Comparator” app and open it



2. Navigate to “Comparator Settings” tab and click on “Baseline Setup” sub tab
3. Click on “All” option and click on “Sync”
4. Wait for Baseline sync to complete. Once synced, “Last Sync Time” will be shown as below



5. All of your org’s profile and permission sets details are now copied in to “Baseline”
6. From Same “Comparator Settings” tab, select “Custom Standard User” profile under “Permissions to Compare against Baseline” section as shown below



7. You can view Baseline created from “Baseline” tab.

(B) Change any of your profile or Permission Set.

1. Go to Setup → Profiles
2. Edit “Custom Standard User” profile.
Note that currently “Allow user to access privacy data” false
3. Make “Allow user to access privacy data” to true
4. Save

(C) Run Comparator

1. Go to “Comparator Result” Tab
2. Click on Run button and wait for a job to complete
3. Once completed view the results

Expected Results

Your comparator results should contain the entry for “Custom Standard User” profile with “Allow user to access privacy data” is set to true

Profile/PS Name	Permission Name	Type	Changed Type	Old Value	New Value	Action
Custom Standard User	Allow user to access privacy data	System Permissions	CHANGED	false	true	Pending

Similarly, you can modify multiple profiles and permissions set and run comparator to view the changes.

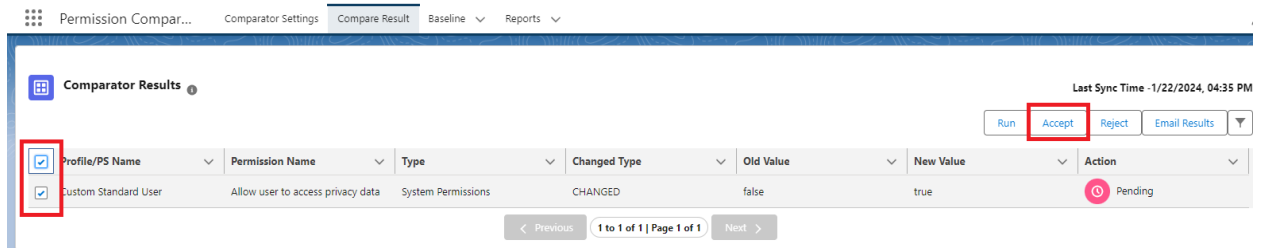
Test Scenario -2 – Accept or Reject the changes

Description – your development team has performed the changes on multiple profiles and permission sets. As an admin, you want to ensure that these changes are reviewed by your “Design Authority” team before it goes on Production. You have installed “Permission Comparator” app on your SIT and UAT sandboxes and configured the Profile and Permission Baseline. You run this tool every day or once changes are moved to SIT or UAT to find out the changes. These changes you now discuss with “Design Authority” and get it approved. Once approved, you want these changes to be updated in your baseline.

You can follow below steps

1. Go to “Comparison Result” tab
2. Review each record

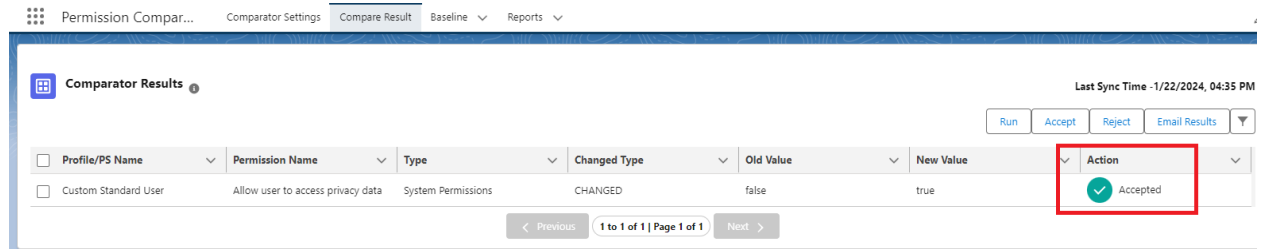
3. Select that record or multiple records in bulk
4. Click on “Accept” button



5. Now these changes are synced in to your Baseline and it want appear next time you run the Comparator

Expected Results

Status of changed records becomes “Accepted”. Now if you again run the Comparator, it won’t appear.



Note – Similarly, Admin can reject the changes.

Test Scenario -3 – Email the results

Description – As an admin, you want to email the all changes to profiles and permission sets to a set of the users. Before you “Run” the comparator, make sure you add the required users to distribution list as follow

Steps

1. Navigate to “Comparator Settings” Tab
2. Click on “Email” sub tab
3. Click on “Email Results” checkbox
4. Save
5. Click on “Add”
6. Select “Salesforce user” and enter search term. It will show the user list
7. Select user

8. Save

The screenshot shows the 'Email Settings' configuration page. On the left sidebar, the 'Email' tab is selected and highlighted with a red box. The main content area has a tabbed interface with 'Comparator Settings' selected. Under 'Email Settings', the 'Email Results' checkbox is checked and highlighted with a red box. Below it are text input fields for 'Email Subject' and 'Email Body'. The 'Save' button is highlighted with a red box. At the bottom, the 'Selected Users' section shows a table with one user, 'Bram...', and an 'Add' button highlighted with a red box.

9. Navigate to “Compare Result” tab

10. Click on “Email Results”

11. Email will be received by the add users in their email box with CSV file attached.

Test Scenario -4 – Automate Run comparator job and email results

Description – As an admin, you want that this app should run comparator job every day and send results on email without need of manually running it

This app allows an admin to schedule the comparator job as described below

Steps

1. Navigate to “Comparator Settings” Tab
2. Click on “Scheduler” sub tab
3. Select details as shown below and “Schedule”

Permission Compar... Comparator Settings Compare Result Baseline Reports

Home
Baseline Setup
Scheduler
Email

Scheduler Settings

Frequency
☒ Weekly
☐ Monthly

Recurs every week on
☒ Sunday
☒ Monday
☒ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☒ Saturday

* Start Date
 Jan 22, 2024

* End Date
 Jan 31, 2024

Preferred time * Hour: 17 * Minutes: 15

[Schedule](#) [Clear](#)

Expected Results

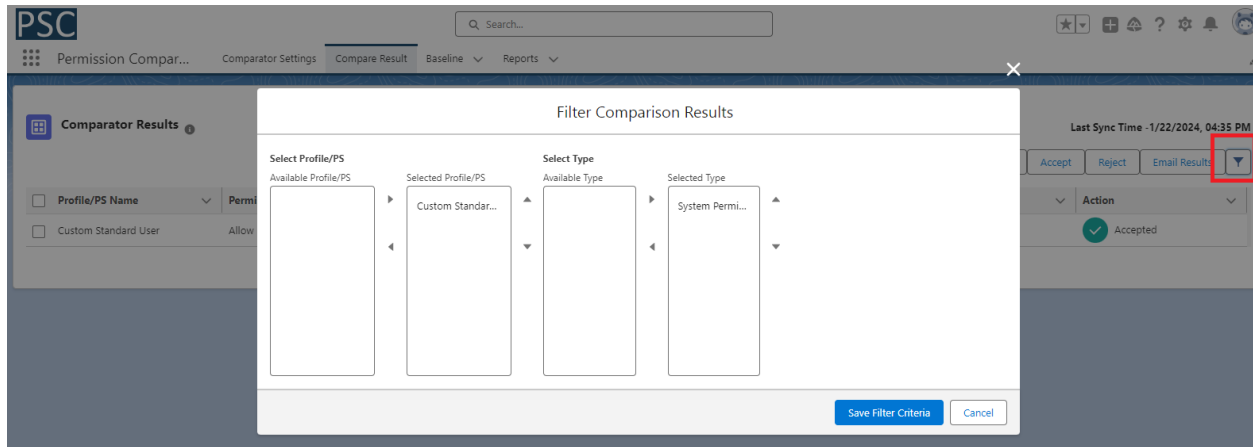
Comparator Job will run at scheduled time and email the results

Test Scenario -5 – Other Scenarios

Compare Result tab

As an admin you can filter the results

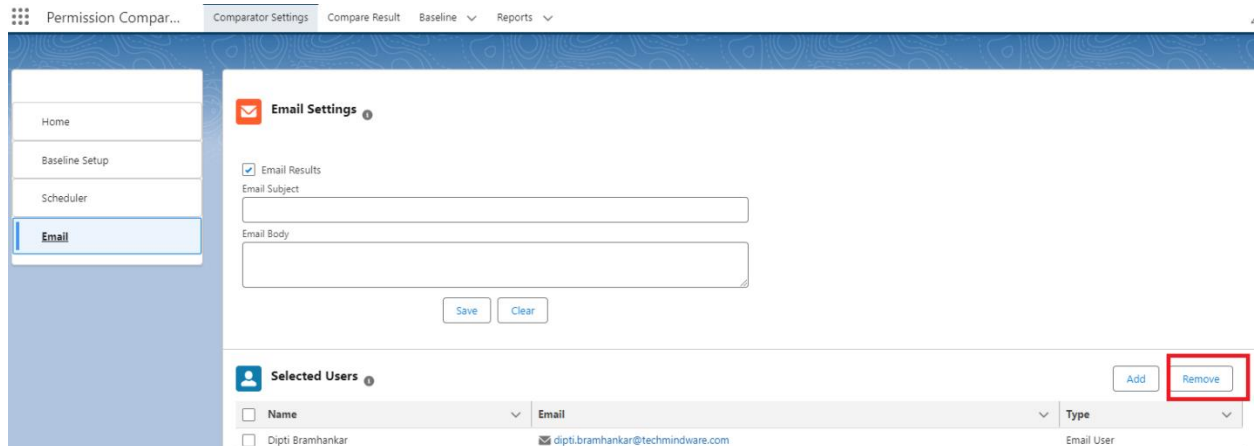
Click on filter button as shown below



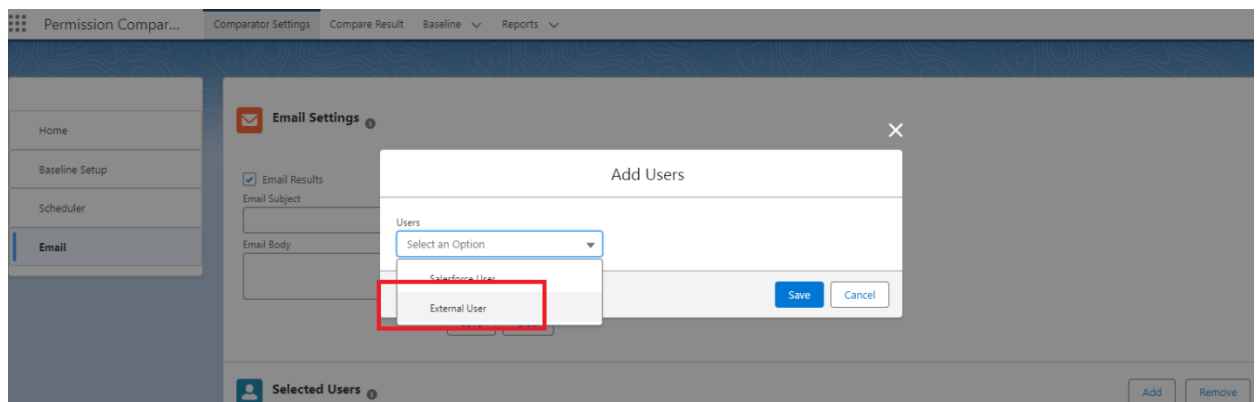
Comparator setting tab

"Email" sub tab

1. Delete users



2. Add external users



3. Define custom “subject” and “Email body” for your results to be sent over email

Permission Compar... Comparator Settings Compare Result Baseline ▾ Reports ▾

Home
Baseline Setup
Scheduler
Email

 **Email Settings** ⓘ

☒ Email Results

Email Subject
Comparator Results

Email Body
Hi,
Please find attached results

Regards,
Company Admin

Save Clear