

# PermissionWise – Product Details

## Introduction

PermissionWise is a managed package developed by Ngaugedigital Private Limited. This document is a guide and reference for understanding, installing and configuring the package.

## Problem Statement

For admins of Salesforce Org, one of the most frequent tasks is to create users and assign them with appropriate permission (Permission Sets or Groups). Also, based on persona and role, adding them to required Public Groups. The activities to be performed includes:

- Laborious task to assign Permission Sets, Permission Set Groups and Public Groups when a user is created
- Keeping consistency of assignments Permission Sets, Permission Set Groups and Public Groups, when user Profile or role is updated
- This manual activity is time consuming
- Delay to provide access, blocks user from accessing the required functionality

PermissionWise solves this problem by automating the assignment.

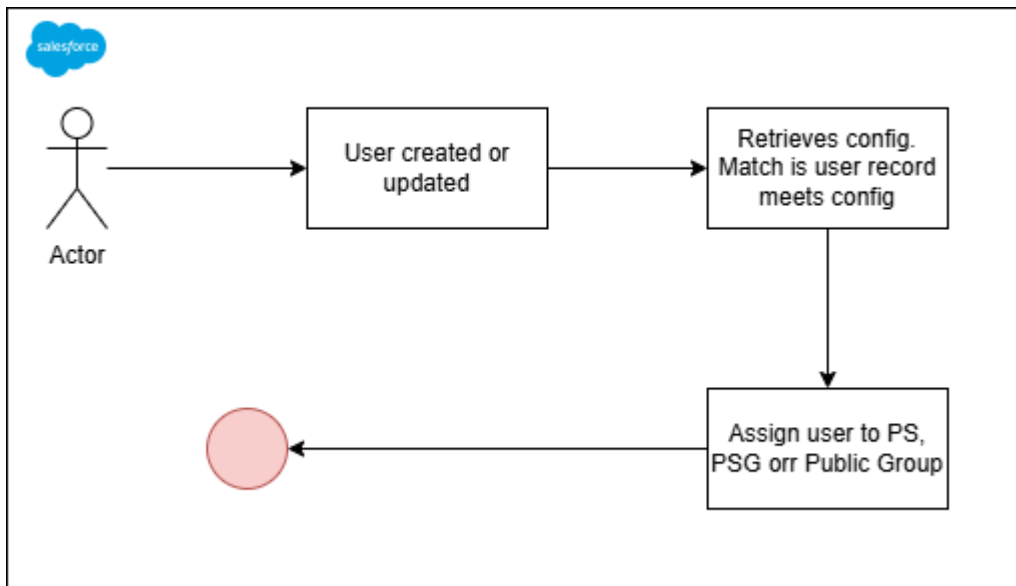
## Solution Approach

**PermissionWise** is an automation process designed to streamline the assignment of Permission Sets, Permission Set Groups, and Public Groups to users based on predefined configurations. This utility allows for easy configuration of rules that are applied when a user matches specific criteria, such as their Profile or User Type or both.

The automation process is triggered automatically upon the creation of a new user, as well as whenever there is an update to a user's Profile or Type. This ensures that users are consistently granted the appropriate permissions without manual intervention. Furthermore, if a user's profile undergoes a change, this utility ensures the efficient removal of old permission set or group assignments while simultaneously introducing new ones.

Configurations are stored as records within a custom object, making it simple to manage and update as needed. With **PermissionWise**, organizations can enhance their user management processes, ensuring a more efficient and low complexity approach to permissions management.

## Flow Diagram



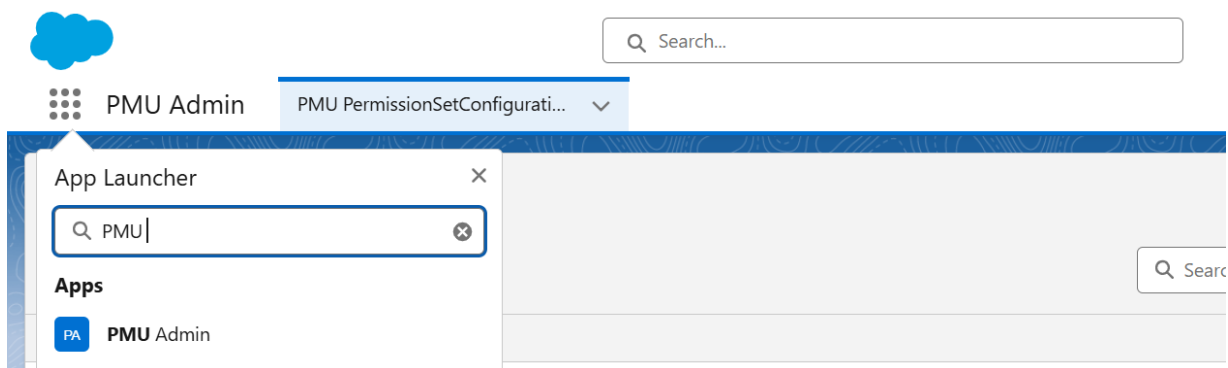
## Setup Procedure

### Initial Setup:

1. Install the package using the provided installation link
2. Upon successful installation, assign Permission Set 'PMU Admin' to the System Admin user. This permission set is required to access PMU App and objects to setup the configuration

### Configuration:

1. Navigate to 'PMU Admin' App using App Launcher (screenshot #1)
2. Create records in PMU Permission Set Configuration object which govern the assignment of Permission Set, Permission Set Group and Group to the user (based on profile or user type)



*Screenshot #1: Navigating to PMU Admin App*

### New PMU Permission Set Configuration

\* = Required Information

Information

\* PMU Config Name

Complete this field.

Owner

Vinit Jogani

Permission Set Group Name

Permission Set Name

Profile Name

User Type

Public Group

isActive

☒

Cancel

Save & New

Save

*Screenshot #2: Creating configuration record*

- a. [PMU Config Name](#): Name can be anything to denote the purpose. (no significance in terms of processing)
- b. [Permission Set Name](#): Name of the *Permission Set* (should be the same Name as the Name of the Permission Set)
- c. [Permission Set Group Name](#): Name of the *Permission Set Group* (should be the same Name as the Name of the Permission Set Group)
- d. [Public Group](#): Name of the *Group*. (should be the same Name as the Name of the Public group).
- e. [Profile Name](#): Name of the *Profile (Standard Field in User object)*, to validate *User* for the configuration.
- f. [User Type](#): Value of the *Type (Custom Field in User object.)* assigned to user, to validate *User* for the configuration.

g. [isActive](#): Checked by default. Inactive configurations are skipped while processing.

### How It Works:

Create configuration as mentioned above. Map your organization's requirement of Profile or User Type (custom field) to required Permission Set, PS Group or Public Group.

Once a user is created / updated and it matches the Profile or User Type criteria, configured Permission Set and/or Permission Set Groups are assigned to the user and the user is added to Public Group (if configured).