

CASE STUDY: MIGRATING DATA

Discover

How Permatrix helped our customer - a Salesforce consultancy - complete a data migration project in record time using Permatrix's consolidated export features.

Background

A team of Salesforce consultants working on a big data migration project were looking for an easier way to export user access information. The team relied on stringing together multiple spreadsheets in order to collect the information they needed. Their process was taking too much time, and they needed to meet a tight deadline.

The team needed to view object and field level security and all relevant Salesforce Ids for each user from each possible assignment source, including profiles, permission sets, and permission set groups.

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C	D	E	F	G	H	I	J	K	L	M	N
API Name	Metadata	Type	Source	Name	Source Id	Profile Id	Permission S	Permission S	Assignment Create	Read	Edit
sStartData	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eContractLine	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eContractLine	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
AssetId	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Description	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Discount	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
EndDate	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
ListPrice	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
LocationId	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eParentContract	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eRootContract	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
StatusDate	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Status	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
iStatistical	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Subtotal	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
TotalPrice	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Customer	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Customer	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
CustomerSta	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
rTotalTime	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
gDataUsrLog	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
gDataUsrLog	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Description	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Squad	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
aDataUsrObj	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
aDataUsrObj	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Description	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tIsMaintain	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tIsMaintain	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tIsMaintain	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tLegalAssist	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eDelegatedAc	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eDelegatedAc	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Document	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Document	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eDuplicateRel	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eDuplicateRel	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Employee	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Employee	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tEngagement	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
tEngagement	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Entitlement	Object	Permission Set	Access_to_CPS82000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
Entitlement	Object	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
AssetId	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
eBusinessHou	Field	Profile	System Admin	00e8200000	00e8200000	0P8Z00000001CtYWAU	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	0P8Z00000001FBDAAW	TRUE	TRUE
sdyUser_leadsoo +											
available											

Solution:

5-10x *Faster Task Completion*

In a single click, Permatrx's export functionality allowed the team to organize all relevant user access information into one spreadsheet per user. This drastically reduced the preparation time and manual work needed for the project, freeing up more resources so that the team could deliver by their deadline.

