
ADMIN TASK OPTIMIZER

User Guide

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INTRODUCTION

Field Level Security (FLS) settings provide restriction control for the purpose of accessing, viewing, and editing specific fields. It can be set for different profiles and permission sets. Field permissions specify the level of access for each field in an object.

Salesforce Administrators use Field Level Security features to grant a field access to a particular profile/permission set but manually setting up the Field Level Security for each field for every profile can be laborious and error-prone.

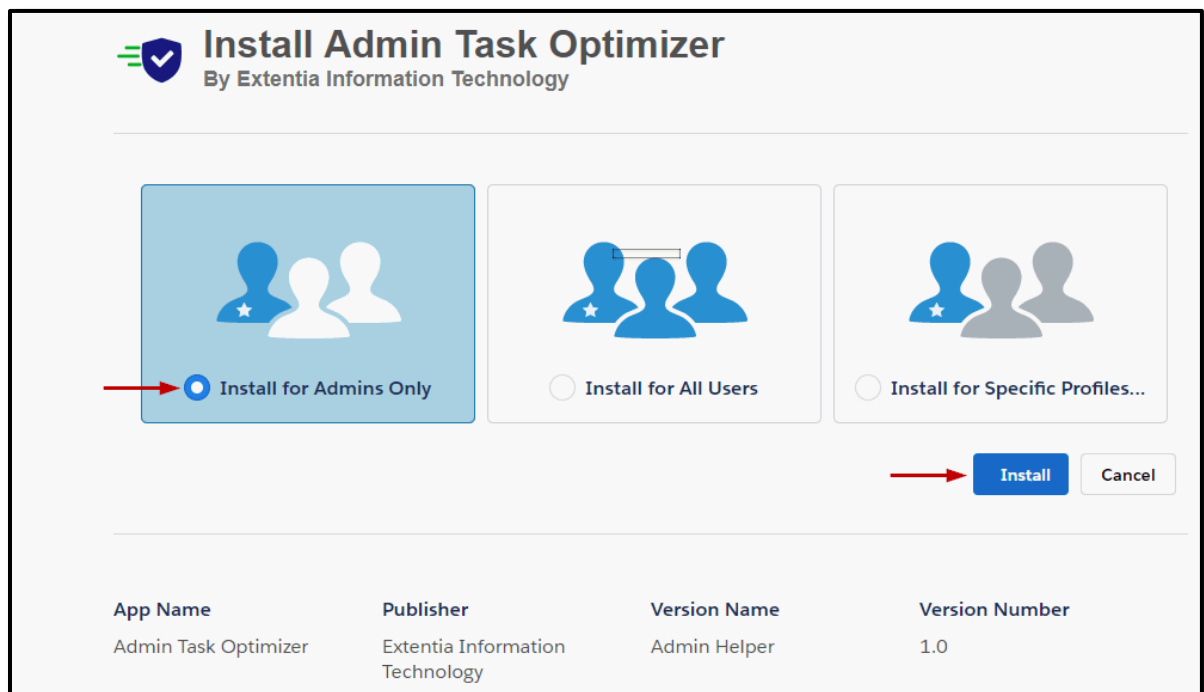
To avoid this and make an administrator's life easier, we have introduced the *Admin Task Optimizer* Salesforce app, which helps them set up Field Level Security in bulk and schedule it as required. Admin Task Optimizer also provides reports and dashboards to view the status of your tasks.

Note: Before working with the app, make sure Lightning environment is enabled and 'mydomain' is deployed for all the users.

INSTALLING ADMIN TASK OPTIMIZER

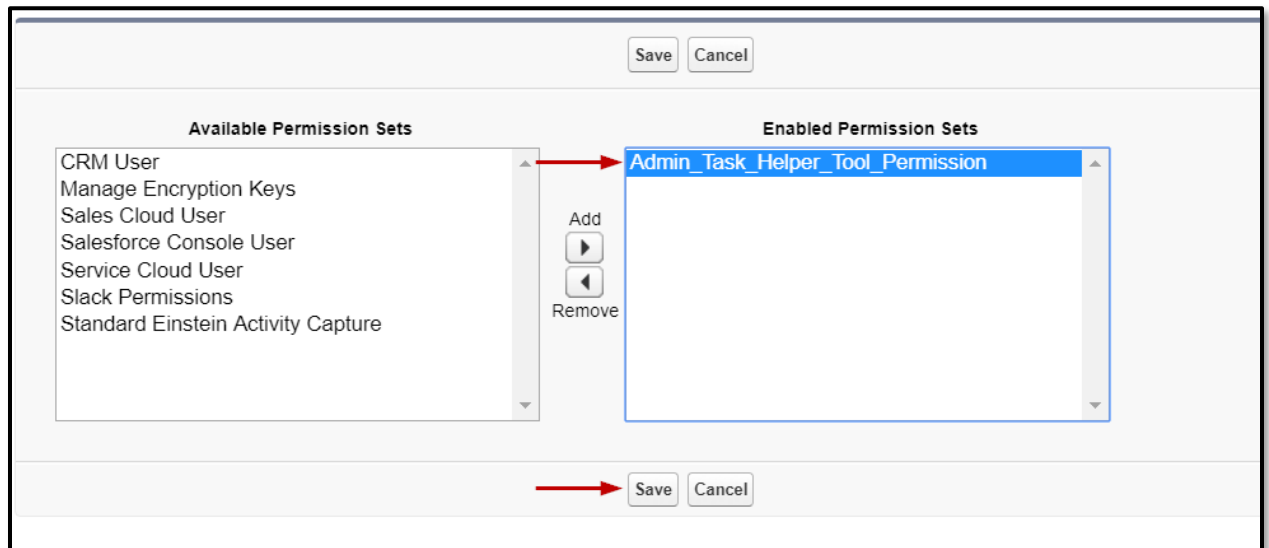
To install the Admin Task Optimizer app:

1. On the **Install Admin Task Optimizer** page, select **Install for Admins Only** and then click **Install**.

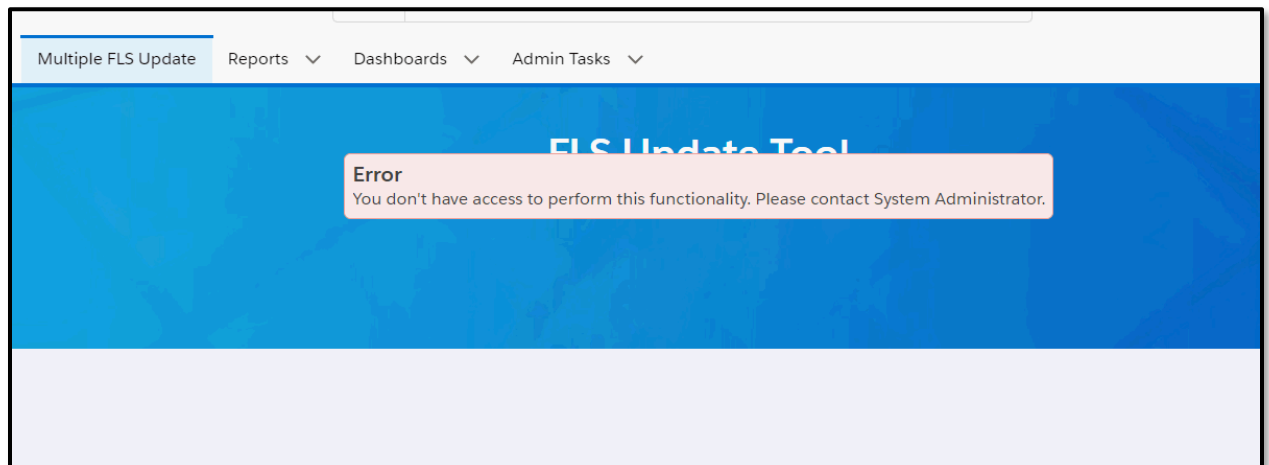


2. To use the Admin Task Optimizer, System Admin users also need a permission. Due to that all System Admin users will not get access to update permissions in bulk. To assign permission sets, go to **Setup > Users > Admin User** (open an admin user profile).

3. On the **User** page, go to the **Permission Set Assignments** related list and click **Edit Assignments**.
4. On the **Permission Set Assignments** page, select and move *Admin_Task_Helper_Tool_Permission* to **Enabled Permission Sets** list.



5. Click **Save**.
The installation is complete and the required permission set is assigned.
Now you can go to the **App Launcher** and start the **Admin Task Optimizer** app.
You should be able to access the app now without any errors.
6. The System Admins with no permission set assigned, will see a message as shown below when they open the **Admin Task Optimizer** app.



An error typically appears due to access restrictions. You will need to assign required permission sets to access the app.

SETTING UP FIELD LEVEL SECURITY

FLS Update Tool

To set the Field Level Security:

1. Login to the app using your credentials and click the **FLS Update Tool** tab.

2. **Step 1:** Select an Object from the list.

3. **Step 2:** Select the fields for which you want to set the Field Level Security.

You can select multiple fields in the **Available Fields** list by pressing the *Ctrl* key on your keyboard. Then click ► to move them to the **Selected Fields** list.

Step 2
Please choose fields for which you want to set the FLS. Note that, this will overwrite the existing FLS for the selected fields in your org.

*** Select Fields**

Available Fields	Selected Fields
NAICS Description (naicsDesc)	Account Fax (Fax)
Number of Locations (ext_ah_...)	SIC Description (sicDesc)
Ownership (Ownership)	SIC Code (Sic)
Parent Account ID (ParentId)	SLA (ext_ah__SLA__c)
SLA Serial Number (ext_ah__S...	SLA Expiration Date (ext_ah__SL...
Shipping Address (ShippingAd...	
TestObject (ext_ah__TestObj...	

You have selected 5 values.

Note: Please use Ctrl+A to select all fields.
Please use Ctrl to select multiple options.

Note: This will overwrite the existing Field Level Security permission for the selected fields in your org.

4. **Step 3: Select Profiles.**

Step 3
Please select profiles

Select Profiles

Available Profiles	Selected Profiles
Analytics Cloud Security User	Analytics Cloud Integration User
Authenticated Website	Chatter External User
Chatter Free User	
Chatter Moderator User	
Contract Manager	
Cross Org Data Proxy User	

You have selected 2 value(s).

5. **Step 4: Select appropriate permissions.**

Step 4
Please select appropriate permission.

☒ Read Only
☒ Visible

Update Now **Update Later**

6. Click **Update Now** to save the changes you've made.

OR

Click **Update Later** to schedule the update for a later time and date. Select a date and time for the update, then click **Schedule**.

*** Start Time**

Apr 18, 2019 12:00 PM

Schedule **Cancel**

The update will take place on the date and time you've specified.

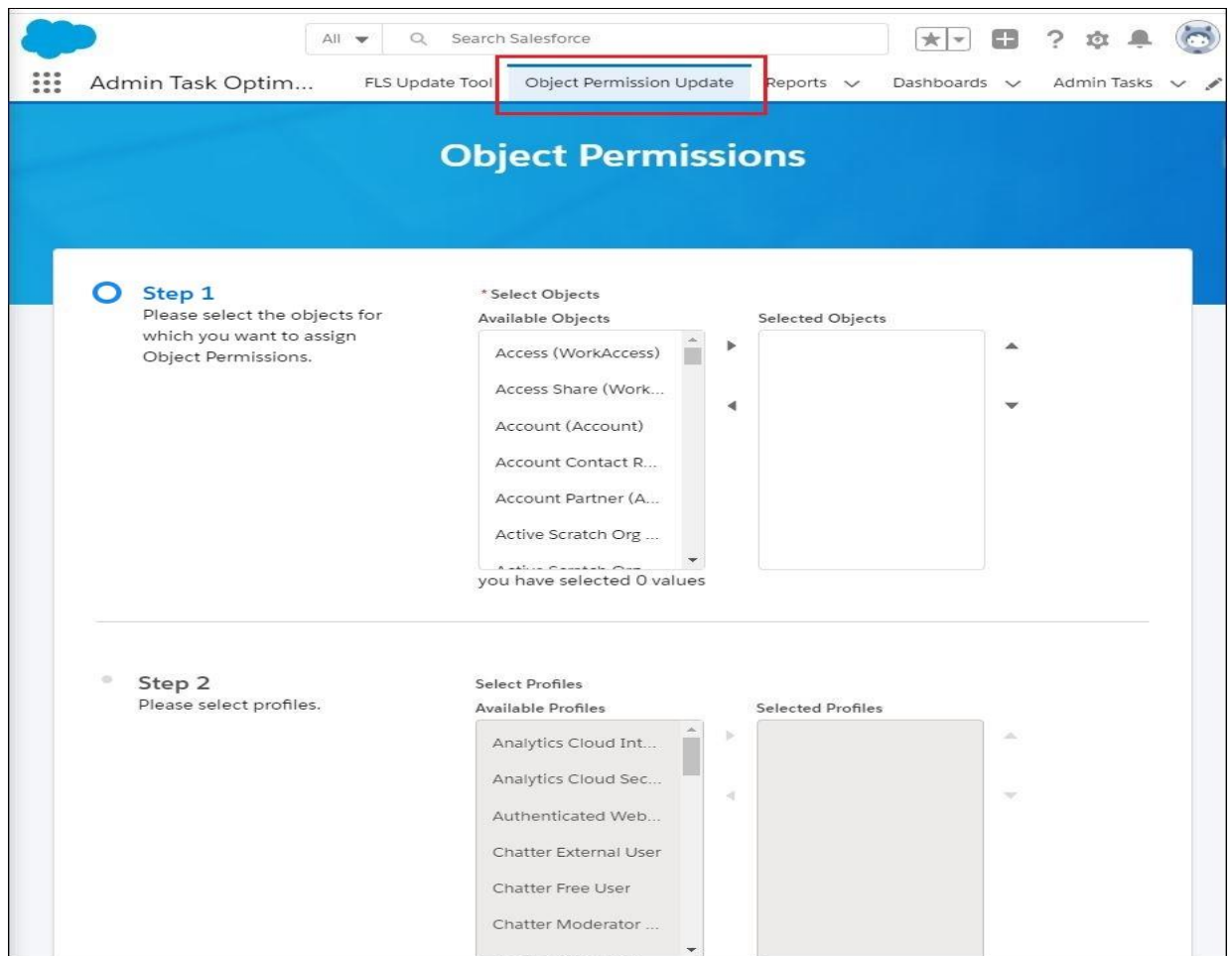
You will receive an email when the update is completed. The Field Level Security will be set for the selected fields.

Object Permission Update

To set the object permission:

1. Click the **Object Permission Update** tab.

1. Click the **Object Permission Update** tab



2. **Step 1:** Select an Object from the list.

You can select multiple objects in the **Available Objects** list by pressing the *Ctrl* key on your keyboard. Then click ► to move them to the **Selected Objects** list.

Step 1
Please select the objects for which you want to assign Object Permissions.

* Select Objects

Available Objects

- Access (WorkAccess)
- Access Share (WorkAccessShare)
- Account Contact Role (Accoun...
- Account Partner (AccountPart...
- Active Scratch Org (ActiveScrat...
- Active Scratch Org Share (Activ...

Selected Objects

- Account (Account)
- Case (Case)

you have selected 2 values

3. **Step 2:** Select the profiles for which you want to set the object permission.

You can select multiple fields in the **Available Profiles** list by pressing the *Ctrl* key on your keyboard. Then click ► to move them to the **Selected Profiles** list.

Step 2
Please select profiles.

Select Profiles

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Chatter External User
- Chatter Free User
- Chatter Moderator User

Selected Profiles

- Standard User
- System Administrator

You have selected 2 values.

Note: This will overwrite the existing object permission for the selected profiles in your org.

4. **Step 3:** Select appropriate permissions.

Step 3
Please select appropriate permission.

- ☒ Read
- ☒ Create
- ☒ Edit
- ☐ Delete
- ☐ View All
- ☐ Modify All

Update Now Update Later

5. **Step 5:** Click **Update Now** to save the changes you've made.

OR

Click **Update Later** to schedule the update as per your convenience. Select a date and time for the update, then click **Schedule**.

* Start Time

Apr 18, 2019 12:00 PM

Schedule Cancel

The update will take place on the date and time you've specified.

You will receive an email when the update is completed. The object permission will be set for the selected fields.

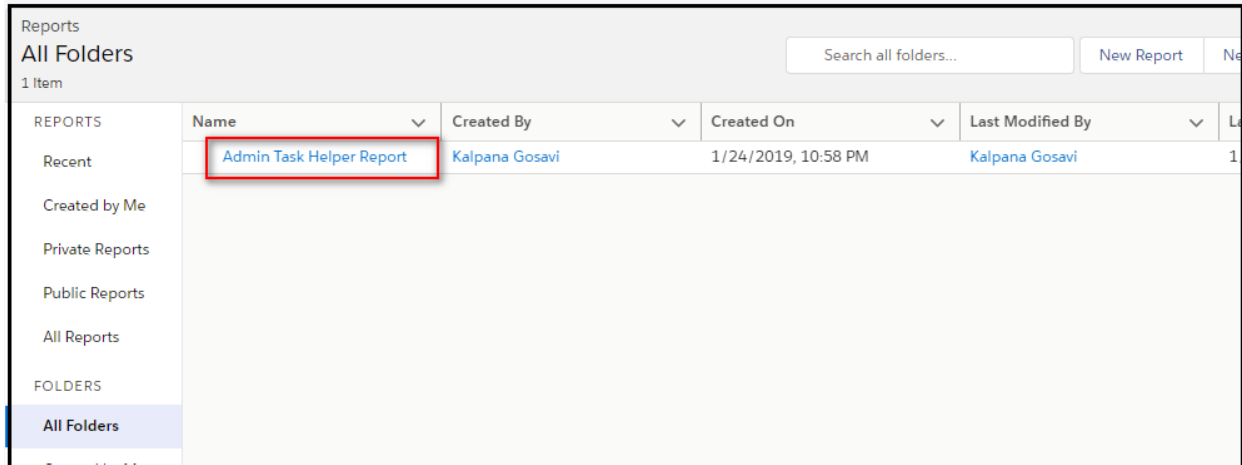
REPORTS AND DASHBOARDS

Reports

From the **Reports** tab, you can view existing/inbuilt reports or create new reports (by cloning existing reports) based on the Field Level Security settings of various fields and objects.

Accessing Reports

You can view existing reports from the **Admin Task Helper Report** folder.



Reports					
All Folders					
1 Item					
	Name	Created By	Created On	Last Modified By	
REPORTS	Admin Task Helper Report	Kalpana Gosavi	1/24/2019, 10:58 PM	Kalpana Gosavi	1
Recent					
Created by Me					
Private Reports					
Public Reports					
All Reports					
FOLDERS					
All Folders					

The **Admin Task Helper Report** folder has the following reports:

- Scheduled FLS Update Report** – Displays record details along with scheduled dates and times.
- Overall FLS Update Admin Task Report** – Displays the details of successfully updated records, failed records, and records that are scheduled to be executed in the future.
- Failed FLS Update Report** - Displays the details of failed records along with the error message.
- Completed FLS Update Report** - Display the details of successfully updated records.

Accessing Reports

To open a report, click on **Report Name**. You can also search for a specific report in the **Search Reports** box.

A report page displays information about records from the FLS Update. Reports contain data such as Object Name, Type, Label, and Name. They also display *Edit* and *Read* permissions for all the fields.

REPORT: ADMIN TASKS Completed FLS Update Report							
This report will display successfully completed records for FLS Update.							
Total Records	Total Edit	Total Read					
123	21	123					
ObjectName	Type	Label	Name	FieldNames	Edit	Read	Status
Account (33)	Profile (26)	Analytics Cloud Security User	Analytics Cloud Security User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		Chatter External User	Chatter External User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		Chatter Only User	Chatter Only User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		Customer Portal Manager Standard	Customer Portal Manager Standard	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		Force.com - Free User	Force.com - Free User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		External Identity User	External Identity User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed
		Gold Partner User	Gold Partner User	Fax,Phone,Site,Industry,ext_ah__NumberofLocations__c	☒	☒	Completed

Reports also display the total number of records, the total editable records, and the total read-only records.

Dashboards

From the **Dashboards** tab, you can view existing/inbuilt dashboards and create new dashboards based on the Field Level Security settings of various fields and objects. Dashboards display a graphical view of selected FLS update reports.

Accessing Dashboards

You can view existing reports from the **Admin Task Helper Dashboard** folder.

Dashboards					
All Dashboards					
3 items					
DASHBOARDS Recent Created by Me Private Dashboards All Dashboards FOLDERS All Folders					
DASHBOARD NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	
Admin Task Status	This dashboard is used to displa...	Admin Task Helper Dashboard	Kalpana Gosavi	1/21/2019, 5:17 PM	
Overall Admin Task Status	This dashboard is used to displa...	Admin Task Helper Dashboard	Kalpana Gosavi	1/25/2019, 12:37 PM	
Sample dashboard		Private Dashboards	Rahul Shukla	4/17/2019, 3:05 PM	

The **Admin Task Helper Dashboard** folder has the **Admin Task Status** dashboard.

To open a dashboard, click on **Dashboard Name**. You can also search for a specific dashboard in the **Search Dashboard** box.

A dashboard page displays selected components that show information pertaining to records from FLS Updates.

