



The Permissioner - User Guide for Lightning

November 30, 2021 – Version 3.0

This product is 100% native to Salesforce so inherits all the security, compliance, and regulatory conditions provided by Salesforce. Arkus does not provide any additional security documentation.

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Overview

Permission Sets became generally available for orgs in the Winter '12 release. Permission Sets allow administrators to provide individual permissions in conjunction with profiles to enable access for certain users on an ad hoc basis, thus reducing a growing and unmanageable number of profiles in a Salesforce org.

The Permissioner dramatically reduces the time and frustration involved with assigning and revoking Permission Set assignments to multiple users. Using a simple interface, administrators can select one or more Permission Sets to assign to one or more users at a time. When a Permission Set is selected and users are searched, only those users not already assigned to it will display in the list. This is useful when trying to assign more than 1000 users. With The Permissioner, life is made easy by assigning a Permission Set to as many users as needed from one intuitively simple screen.



The Permissioner is now accessible in Lightning and is available for these following Salesforce.com editions: Enterprise, Unlimited, Developer, and Performance.

Release Notes - Version 3.0 (Winter 22)

In addition to the existing features listed below, these new features are available in The Permissioner as of this Winter 2022 release:

- Permission Set and Permission Set Group Usage Tab.
- Security fixes.

Accessing The Permissioner

There are three ways you can access The Permissioner:

1. Desktop – AppLauncher
 - Available in Classic and Lightning
 - Classic – Please use “The Permissioner”
 - Lightning – Please use “The Permissioner Lightning”
 - No steps needed for use by System Administrator
 - Please see the Installation Guide if User is not a System Administrator
2. Desktop – Lightning Component
 - Lightning Only
 - Use on any page
 - Steps needed before use
3. Mobile device
 - Steps needed before use

Please work with your System Administrator, and the Permissioner Installation Guide, to configure the best placement of The Permissioner for your organization.

The Permissioner package downloaded from the AppExchange includes a custom app and custom tab. These are the only components that you will need to successfully assign Permission Sets to multiple users.

The Permissioner app only contains one tab, called The Permissioner. This tab contains four subtabs: Mass Assignment, Mass Revocation, Permission Set Usage, and an Instructions sheet. The Assign and Revoke tabs both have lists views, and from here you will find Permission Sets and users.

Note: If you have “Send Apex Warning Emails” checked on your user record, you will receive an



email notifying you of a SOQL Query Warning. This is normal and does not impact the performance of The Permissioner or your Salesforce org.

The Permissioner ... Home The Permissioner

The Permissioner

Assign Revoke Instructions

SEARCH FOR PERMISSION SETS

Search Filter All

☐ Name ☐ Description ☐ User License ☐ Last Modified

Assigning Permission Sets

1. From the Search for Permission Sets list, you may search for terms either by the individual permission(s) included in the Permission Set, object and field security, or by the name of the Permission Set. Based on these results, you can choose to sort by its name, user license type, or the last modified date.

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The Permissioner

Assign Revoke Instructions

SEARCH FOR PERMISSION SETS

Search Filter All

☐ Name ☐ Description ☐ User License ☐ Last Modified

- ✓ All
- Individual Permission
- Permission Sets
- Permission Set Groups
- Objects and Fields

2. Use the checkboxes in the far left column of the search results to select the Permission Sets you wish to assign. It is important that you only select Permission Sets of the same Salesforce user license type, otherwise the application will prompt you with an error.
Note: If you have more than 10 Permission Sets to assign, you may use the buttons labelled Previous, Next, or the page number to select Permission Sets on additional pages.

SEARCH FOR PERMISSION SETS

Search Filter All

[Deselect All](#)

Name ↑	Description	User License	Last Modified
☐ EinsteinAnalyticsUser	View Einstein Analytics apps and dashboards.	Analytics Platform	Dec 3, 2019
☐ LightningRetailExecutionPlusPsl	Allows access to Lightning Retail Execution features	Lightning Retail Execution Plus Psl	Dec 3, 2019
☐ Permissioner_Permission_Set		Chatter Free	Dec 3, 2019
☐ SalesConsoleUser	Enable Salesforce Console User	Sales Console User	Dec 3, 2019
☐ StandardEinsteinActivityCapturePsl	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User	Dec 3, 2019
☒ The_Permissioner_Permission_Set	Contains user permissions for a Salesforce user to use Th...	Salesforce	Dec 3, 2019

Filtering out Users this Permission Set is assigned to
Page: 1 of 1

- From the Assign to Users section, search for users to which you wish to assign the selected Permission Set(s). You may search based on the user's name, username, title, role, profile, a queue, or public group of users. Sort the columns to further refine your results as needed. Users will be listed that currently are not assigned to the Permission Set. If you've selected more than one Permission Set, it will display users that may be assigned to one but not another. In the event this user is selected to be assigned, they will only be assigned to the one they currently aren't assigned to.

ASSIGN TO USERS

Search Filter All

[Deselect All](#)

Name ↑	Email	Username	User License
--------	-------	----------	--------------

Page: 1

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Selected Permission Set License:

[Assign](#)

- Use the checkboxes to select the users that you wish to assign the selected Permission Sets. The users must have a compatible license type with the Permission Sets that you have selected (e.g. you may not assign a Permission Set for a Customer Portal User license to a user with a Salesforce license). If you do not see a user that exists in the system based on your selected Permission Sets, then it is not a compatible assignment. **Note:** If you have more than 10 users that you wish to assign, you may use the buttons labelled Previous or Next, or navigate using the arrows and page numbers as guides to select users on additional pages. You may also use the Select All and Deselect All links.

Global Permission Sets: if only Global Permission Sets are selected above in the Search for Permission Sets section, then you can assign these to users of different license types. You may only assign Global Permission Sets by selecting the Permission Sets first, and then the users.

ASSIGN TO USERS

Search

Filter

All

Deselect All

☒	Name ↑	Email	Username	User License	Role	Profile	Title	Active
☒	Kathryn Puzanghera	kathryn.puzanghera@ark...	kathryn.puzanghera@ark...	Salesforce		System Administrator		☒

After selecting the Permission Sets and users, click **Assign**.

Confirm Assignment

You are about to assign 1 Permission Sets to 1 Users.

Cancel

Assign

- A message window will then appear asking to confirm if you want to assign the number of Permission Sets to the number of users. Click **OK** to proceed. The Permissioner will complete the assignment, provide a notification on the page specifying the amount of assignments created, and an email will be sent to the user that is assigning the Permission Sets that summarizes the assignments in a table.

Revoking Permission Sets

1. From the Search for Permission Sets list under the Revoke tab, you may search for terms either by the individual permission(s) included in the Permission Set, object and field security, or by the name of the Permission Set.

Assign
Revoke
Instructions

SEARCH FOR PERMISSION SETS

Search
Filter
All
Deselect All

Name ↑	Number of Users Assigned	Description	User License	Last Modified
--------	--------------------------	-------------	--------------	---------------

Assign
Revoke
Instructions

SEARCH FOR PERMISSION SETS

Search
Filter
All
Deselect All

Name ↑	Number of Users Assigned	Description	User License	Last Modified
☐ Permissioner_Permission_Set	0		Chatter Free	Dec 9, 2019
☐ The_Permissioner_Permission_Set	1	Contains user permissions for a Salesforc...	Salesforce	Dec 9, 2019

- Use the checkbox in the far left column of the search results to select one Permission Set that you wish to revoke.

SEARCH FOR PERMISSION SETS

Search

Filter

Deselect All

Name ↑	Number of Users Assigned	Description	User License	Last Modified
☐ Permissioner_Permission_Set	0		Chatter Free	Dec 9, 2019
☒ The_Permissioner_Permission_Set	1	Contains user permissions for a Salesforc...	Salesforce	Dec 9, 2019

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- From the Assigned Users section, search for users to which you wish to revoke the selected Permission Set(s). You may search based on the user's name, username, title, role, profile, or a queue or public group of users. Use the sortable columns to further refine your results as needed.

REVOKE FROM USERS

Search

Filter

Deselect All

☐	Name ↑	Email	Username	User License	Role	Profile	Title	Active
☐	Kathryn Puzzan...	kathryn.puzzang...	kathryn.puzzang...	Salesforce		System Adminis...		✓

REVOKE FROM USERS

Search

Filter

Deselect All

☒	Name ↑	Email	Username	User License	Role	Profile	Title	Active
☒	Kathryn Puzzan...	kathryn.puzzang...	kathryn.puzzang...	Salesforce		System Adminis...		✓

4. Use the checkboxes to select the users to revoke the selected Permission Set from.
Note: If you have more than 10 users with Permission Sets you wish to revoke, you may use the buttons labelled Previous, Next, or the arrows with the page numbers as guides to select users on additional pages.
5. After selecting the Permission Set and users, click **Revoke**. A message window will appear asking to confirm if you want to revoke the number of Permission Sets to the number of users. Click **OK** to proceed.
6. The Permissioner will complete the revocation and provide a notification on the page specifying the amount of assignments revoked. Also, an email will be sent to the user that is revoking the Permission Sets that summarizes the revocations in a table.

Filter			
1 permission sets have been revoked from 1 users. A detailed email of this assignment has been sent to kathryn.puzzanghera@arkusinc.com			
Number of Users Assigned	Description	User License	Last Modified
1	Contains user permissions for a Salesforce user...	Salesforce	Dec 3, 2019

Cleanup of Permission Sets and Permission Set Groups

Under the “Permission Set Usage” tab, you can clean up Permission Sets or Permission Set Groups in their respective subtabs for those with inactive users assigned.

Assign	Revoke	Permission Set Usage	Instructions
Permission Sets Permission Set Groups			
LIST VIEWS All Permission Set Assignments			
Deselect All Analyze Permission Set Usage Delete Permission Set Assignments to Inactive Users Delete Permission Sets			
☐	Permission ...	Description	License
		Session Acti...	Created By
		Created Date	Last Modifie...
		Last Modifie...	Last Modifie...
		Active Users	Inactive Users
Page: 1 of 0 < < Prev Next > >			

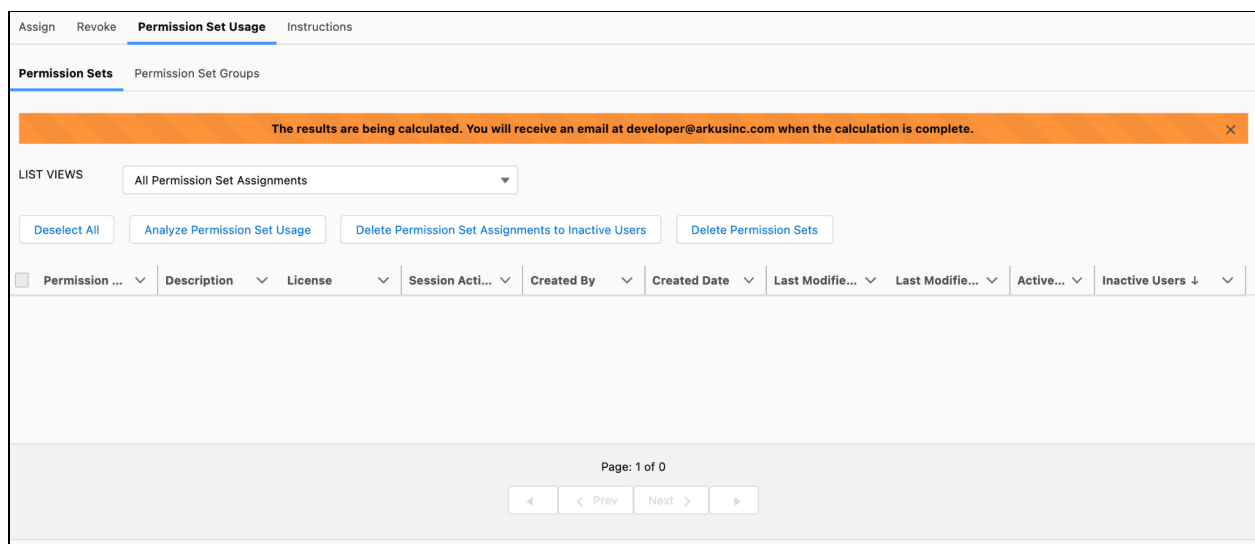
Permission Sets Subtab

1. This subtab shows the analysis of all Permission Sets in your org, including statistics on

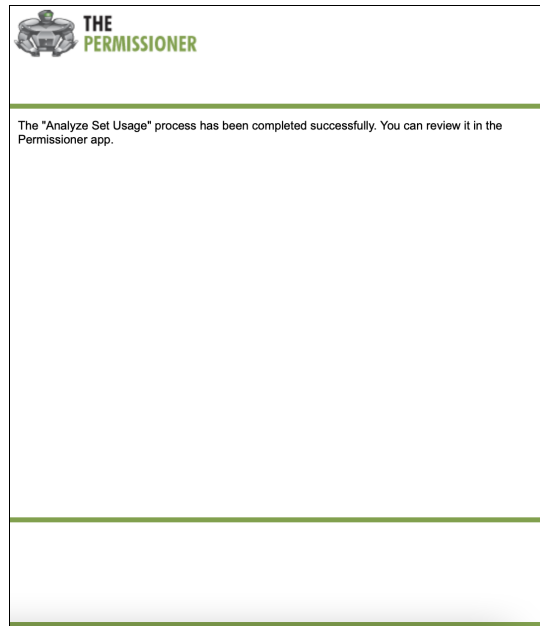
Active and Inactive Users assigned to each.

2. Click on the “Analyze Permission Set Usage” button to launch the process to calculate the users assigned to existing Permission Sets. Note that this calculation is not live, so you must launch the process to update the data with the most recent statistics. The results will be stored in a custom object called “Permission Set Usage” with the following fields:
 - a. Permission Set Name.
 - b. Description.
 - c. License.
 - d. Session Activation Required.
 - e. Created By (date and user).
 - f. Last Modified By (date and user).
 - g. Active Users: count of Permission Set Assignments to active users.
 - h. Inactive Users: count of Permission Set Assignments to inactive users.

After the button is clicked, a message will appear at the top notifying about the process.



3. When the process finishes, an email will be sent to the user that launched the process to communicate that calculations are completed and you can go back to the Permissioner to view the results.



- After the email is received, the “Permission Sets” subtab can be refreshed and a message will be shown indicating the last time the process was executed. This message will always be displayed if there are results already calculated.

Assign

Revoke

Permission Set Usage

Instructions

Permission Sets

Permission Set Groups

Last date this data was calculated was 9/30/2021 6:21 pm.

Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS

All Permission Set Assignments

Deselect All

Analyze Permission Set Usage

Delete Permission Set Assignments to Inactive Users

Delete Permission Sets

☐	Permission Set...	Description	License	Session Activa...	Created By	Created Date	Last Modified By	Last Modified ...	Active Users	Inactive Users
☐	AAAAA		Chatter External	false	Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	385	1
☐	Aasana Test ST		Chatter Free	false	Arkus Developer	09/23/2021	Arkus Developer	09/29/2021	11	3
☐	Another test active III	testing VV	Chatter External	false	Arkus Developer	09/22/2021	Arkus Developer	09/22/2021	1	0
☐	BBBBBBB		Chatter External	false	Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	449	2
☐	Caretti ps		Chatter External	false	Arkus Developer	12/07/2012	Arkus Developer	12/07/2012	106	0
☐	CHATTER EXTERNAL		Chatter External	false	Arkus Developer	08/16/2012	Arkus Developer	03/21/2014	482	1

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- The table is sortable and has pagination according to the number of records. There are 10 records per page and the headers are clickable to sort the records. As you can see in the next image the records were sorted by Inactive Users.

Assign

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Last date this data was calculated was 9/30/2021 6:21 pm.

Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS

All Permission Set Assignments

Deselect All

Analyze Permission Set Usage

Delete Permission Set Assignments to Inactive Users

Delete Permission Sets

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users
☐	Ernesto ps			false	Arkus Developer	12/07/2012	Arkus Developer	12/07/2012	176	11
☐	Plankton			false	Justin Edelstein	02/11/2013	Justin Edelstein	02/11/2013	1,988	11
☐	Without User Lic...			false	Arkus Developer	11/09/2012	Arkus Developer	11/09/2012	339	11
☐	Without UserLic...			false	Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	344	11
☐	Permission 10	Permission 10	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	9
☐	Without UserLic...			false	Arkus Developer	11/05/2012	Arkus Developer	11/05/2012	233	9

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Besides sorting with the headers, you can filter records by using the "List Views" dropdown.

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Last date this data was calculated was 10/1/2021 8:21 am.

Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS

All Permission Set Assignments

✓ All Permission Set Assignments

Only Permission Sets with Active Users = 0

Only Permission Sets with Inactive Users = 0

Deselect All

Analyze Permission Set Usage

Assignments to Inactive Users

Delete Permission Sets

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users
☐	AAAAA	Chatter External	false		Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	385	1
☐	Aasana Test ST	Chatter Free	false		Arkus Developer	09/23/2021	Arkus Developer	09/29/2021	11	3
☐	Another test activ... testing VV	Chatter External	false		Arkus Developer	09/22/2021	Arkus Developer	09/22/2021	1	0
☐	BBBBBBB	Chatter External	false		Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	449	2
☐	Caretti ps		false		Arkus Developer	12/07/2012	Arkus Developer	12/07/2012	106	0
☐	CHATTER EXTER...	Chatter External	false		Arkus Developer	08/16/2012	Arkus Developer	03/21/2014	482	1

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- Each row contains a checkbox to select the row and execute one of the clean up actions. You can navigate through the different pages and select rows from any page.

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Last date this data was calculated was 9/30/2021 6:21 pm.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Assignments

Deselect All
Analyze Permission Set Usage
Delete Permission Set Assignments to Inactive Users
Delete Permission Sets

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users
☐	Ernesto ps			false	Arkus Developer	12/07/2012	Arkus Developer	12/07/2012	176	11
☒	Plankton			false	Justin Edelstein	02/11/2013	Justin Edelstein	02/11/2013	1,988	11
☐	Without User Lic...			false	Arkus Developer	11/09/2012	Arkus Developer	11/09/2012	339	11
☐	Without UserLic...			false	Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	344	11
☐	Permission 10	Permission 10	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	9
☐	Without UserLic...			false	Arkus Developer	11/05/2012	Arkus Developer	11/05/2012	233	9

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You may also click on "Deselect All" to uncheck all the records you selected through the pages.

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Permission Set Groups

Last date this data was calculated was 10/1/2021 8:21 am.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Assignments

Deselect All
Analyze Permission Set Usage
Delete Permission Set Assignments to Inactive Users
Delete Permission Sets

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive U... ↓
☐	Ernesto ps			false	Arkus Developer	12/07/2012	Arkus Developer	12/07/2012	176	11
☐	Plankton			false	Justin Edelstein	02/11/2013	Justin Edelstein	02/11/2013	1,988	11
☐	Without User Lic...			false	Arkus Developer	11/09/2012	Arkus Developer	11/09/2012	339	11
☐	Without UserLic...			false	Arkus Developer	11/06/2012	Arkus Developer	11/06/2012	344	11
☐	Permission 10	Permission 10	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	9
☐	Without UserLic...			false	Arkus Developer	11/05/2012	Arkus Developer	11/05/2012	233	9

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- If you want to delete the inactive users from a Permission Set, you may select records with at least 1 inactive user. Once you select records with at least 1 inactive user, you may click the "Delete Permission Set Assignments To Inactive Users" button to delete the current inactive users assigned to the Permission Sets selected.

Permission Sets Permission Set Groups

Last date this data was calculated was 9/30/2021 6:21 pm.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS All Permission Set Assignments

[Deselect All](#) [Analyze Permission Set Usage](#) [Delete Permission Set Assignments to Inactive Users](#) [Delete Permission Sets](#)

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users
☐	Permission 104	Permission 104	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8
☒	Permission 105	Permission 105	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8
☐	Permission 106	Permission 106	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8
☐	Permission 107	Permission 107	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8
☐	Permission 12	Permission 12	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8
☐	Permission 13	Permission 13	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	8

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Permission Sets Permission Set Groups

Last date this data was calculated was 9/30/2021 6:21 pm.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS All Permission Set Assignments

[Deselect All](#) [Analyze Permission Set Usage](#) [Delete Permission Set Assignments to Inactive Users](#) [Delete Permission Sets](#)

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users
☐	Permission 303	Permission 303	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8
☐	Permission 304	Permission 304	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8
☒	Permission 305	Permission 305	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8
☐	Permission 306	Permission 306	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8
☐	Permission 307	Permission 307	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8
☐	Permission 308	Permission 308	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	8

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A message window will then appear asking to confirm if you want to delete the inactive users for the selected Permission Sets. Click Yes to proceed.

Warning

The following action will delete Permission Set Assignments ONLY to Inactive Users for the selected Permission Sets. Permission Set Assignments to Active Users for the selected Permission Sets will remain intact. If you wish to remove the Permission Set Assignments to Active Users please use the Revoke tab.

Do you wish to delete Permission Set Assignments ONLY to Inactive Users for the selected Permission Sets?

No
Yes

8. Now a message will be shown at the top of the subtab letting you know that the process is running and an email will be sent when it finishes.

Assign
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Permission Sets
Permission Set Groups

The results are being calculated. You will receive an email at developer@arkusinc.com when the calculation is complete.
 ×

LIST VIEWS All Permission Set Assignments

Deselect All
Analyze Permission Set Usage
Delete Permission Set Assignments to Inactive Users
Delete Permission Sets

Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users ↓
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After the email is received, the “Permission Sets” subtab can be refreshed and a message will be shown indicating the last time the process was executed. You can check the records you previously selected and see how the inactive users count is now 0.

Assign Revoke **Permission Set Usage** Instructions

Permission Sets Permission Set Groups

Last date this data was calculated was 10/1/2021 7:51 am.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS All Permission Set Assignments

[Deselect All](#) [Analyze Permission Set Usage](#) [Delete Permission Set Assignments to Inactive Users](#) [Delete Permission Sets](#)

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active ...	Inactive Users ↓
☐	Permission Chatter		Chatter Free	false	Arkus Developer	11/30/2011	Arkus Developer	11/30/2011	11	0
☐	Permission DW	This is a descripti...	Chatter Free	false	Arkus Developer	02/16/2012	Arkus Developer	02/16/2012	11	0
☐	Permission Test	Permission Test d...	Salesforce	false	Arkus Developer	10/17/2011	Arkus Developer	02/02/2013	11	0
☐	Permission 105	Permission 105	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	9	0
☐	Permission Test 3	description	Salesforce	false	Arkus Developer	10/17/2011	Arkus Developer	10/28/2011	9	0
☐	Permission Test 6		Salesforce	false	Arkus Developer	11/03/2011	Arkus Developer	11/03/2011	9	0

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Assign Revoke **Permission Set Usage** Instructions

Permission Sets Permission Set Groups

Last date this data was calculated was 10/1/2021 7:51 am.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS All Permission Set Assignments

[Deselect All](#) [Analyze Permission Set Usage](#) [Delete Permission Set Assignments to Inactive Users](#) [Delete Permission Sets](#)

☐	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active ...	Inactive Users ↓
☐	Permissioner Per...		Chatter Free	false	Justin Edelstein	03/15/2012	Justin Edelstein	03/15/2012	9	0
☐	Permission 305	Permission 305	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	0
☐	Permission 310	Permission 310	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	0
☐	Permission 320	Permission 320	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	0
☐	Permission 427	Permission 427	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	8	0
☐	No Stuff Here	Lorem ipsum	Salesforce	false	Justin Edelstein	03/22/2013	Justin Edelstein	03/22/2013	3	0

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9. You may also select some records and click the "Delete Permission Sets" button.

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Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 7:51 am.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Assignments

Deselect All
Analyze Permission Set Usage
Delete Permission Set Assignments to Inactive Users
Delete Permission Sets

	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users ↑	Inactive Users
☐	Permission 456	Permission 456	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 457	Permission 457	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☒	Permission 458	Permission 458	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 459	Permission 459	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 460	Permission 460	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 461	Permission 461	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0

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Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 7:51 am.
Please run the "Analyze Permission Set Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Assignments

Deselect All
Analyze Permission Set Usage
Delete Permission Set Assignments to Inactive Users
Delete Permission Sets

	Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users ↑	Inactive Users
☐	Permission 466	Permission 466	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☒	Permission 467	Permission 467	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 468	Permission 468	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 469	Permission 469	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 47	Permission 47	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0
☐	Permission 470	Permission 470	Salesforce	false	Arkus Developer	07/11/2012	Arkus Developer	07/11/2012	0	0

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<
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>

A message window will then appear asking to confirm if you want to delete the selected Permission Sets. Click Yes to proceed. **Note:** This action will delete the Permission Sets even if they currently have active users assigned.

The following action will delete the selected Permission Sets. This action is not reversible.
Are you sure you want to proceed?

[Revoke](#)
[Permission Set Usage](#)
[Instructions](#)

[on Sets](#)

Permission Set Groups

The results are being calculated. You will receive an email at developer@arkusinc.com when the calculation is complete.

VS

All Permission Set Assignments

Select All

Analyze Permission Set Usage

Delete Permission Set Assignments to Inactive Users

Delete Permission Sets

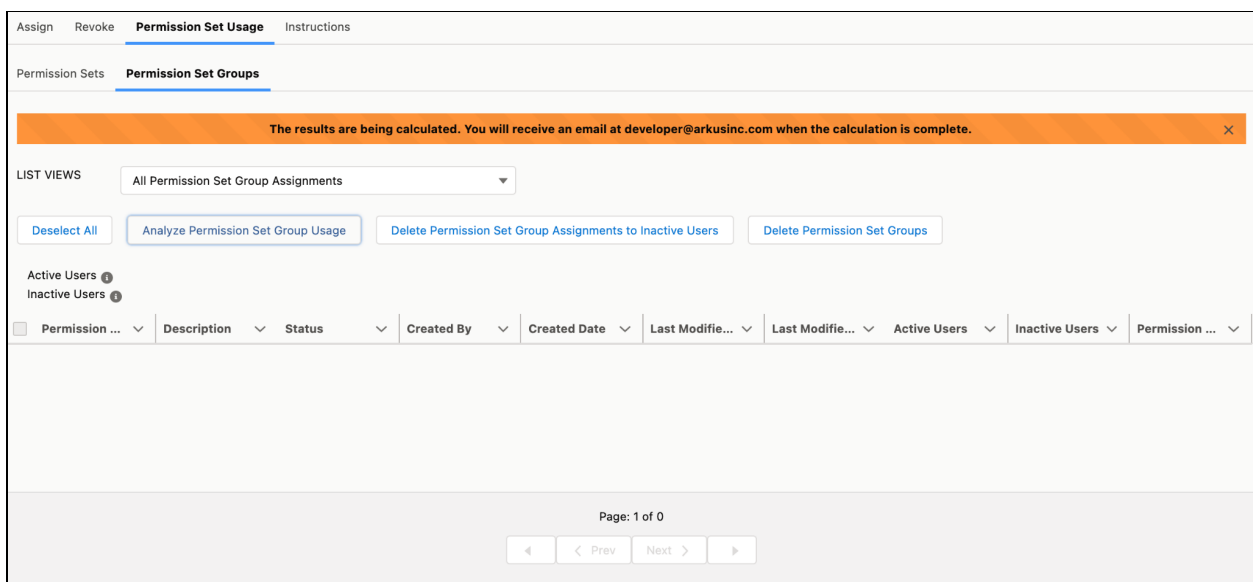
Permission ...	Description	License	Session Acti...	Created By	Created Date	Last Modifie...	Last Modifie...	Active...	Inactive Users
Page: 1 of 0 ◀ < Prev Next > ▶									

This subtab shows the analysis of all Permission Set Groups in your org. including

- statistics on Active and Inactive Users, and Permission Sets assigned to each.
- Click on the “Analyze Permission Set Group Usage” button to launch the process to calculate the users assigned to existing Permission Set Groups. Note that this calculation is not live, so you must launch the process to update the data with the most recent statistics. The results will be stored in a custom object called “Permission Set Group Usage” with the following fields:

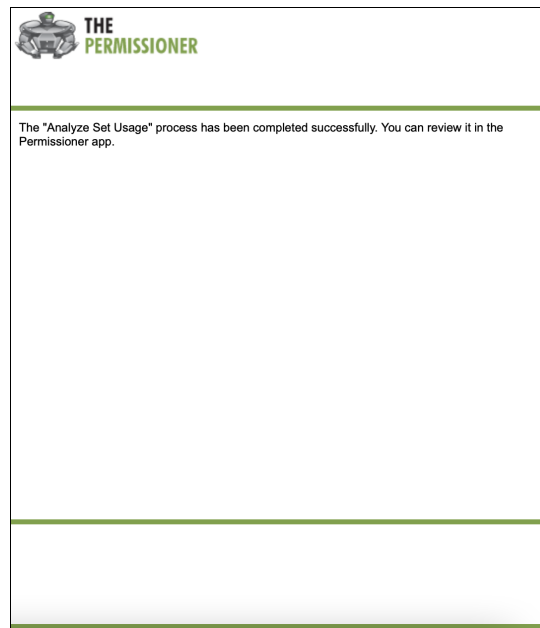
- a. Permission Set Group Name.
- b. Description.
- c. Status.
- d. Created By (date and user).
- e. Last Modified By (date and user).
- f. Active Users: count of Permission Set Group Assignments to active users.
 - **Note:** these are users assigned directly to the Permission Set Group, it does NOT count the users assigned to the Permission Sets included in the Permission Set Group.
- g. Inactive Users: count of Permission Set Group Assignments to inactive users.
 - **Note:** these are users assigned directly to the Permission Set Group, it does NOT count the users assigned to the Permission Sets included in the Permission Set Group.
- h. Permission Sets: count of Permission Sets included in the Permission Set Group.

After the button is clicked, a message will appear at the top notifying about the process.



The screenshot shows the 'Permission Set Usage' tab in the application. At the top, there is a navigation bar with 'Assign', 'Revoke', 'Permission Set Usage' (selected), and 'Instructions'. Below this, there is a sub-header 'Permission Sets' with 'Permission Set Groups' selected. A prominent orange message bar at the top states: 'The results are being calculated. You will receive an email at developer@arkusinc.com when the calculation is complete.' Below the message bar, there is a 'LIST VIEWS' section with a dropdown menu set to 'All Permission Set Group Assignments'. Underneath, there are four buttons: 'Deselect All', 'Analyze Permission Set Group Usage' (highlighted), 'Delete Permission Set Group Assignments to Inactive Users', and 'Delete Permission Set Groups'. Below the buttons, there are two sections: 'Active Users' with a count of 1 and 'Inactive Users' with a count of 1. A table header is visible with columns: 'Permission ...', 'Description', 'Status', 'Created By', 'Created Date', 'Last Modifie...', 'Last Modifie...', 'Active Users', 'Inactive Users', and 'Permission ...'. The table body is empty. At the bottom, there is a pagination bar showing 'Page: 1 of 0' and navigation buttons: '<<', '< Prev', 'Next >', and '>>'.

3. When the process finishes, an email will be sent to the user that launched the process to communicate that calculations are completed and you can go back to the Permissioner to view the results.



- After the email is received, the “Permission Set Groups” subtab can be refreshed and a message will be shown indicating the last time the process was executed. This message will always be displayed if there are results already calculated.

Assign Revoke **Permission Set Usage** Instructions

Permission Sets **Permission Set Groups**

Last date this data was calculated was 10/1/2021 8:35 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS: All Permission Set Group Assignments

Deselect All Analyze Permission Set Group Usage Delete Permission Set Group Assignments to Inactive Users Delete Permission Set Groups

Active Users 1
Inactive Users 1

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users	Permission ...
☐ AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐ DDD GROUP TES...		Updated	steven galindo	09/27/2021	steven galindo	09/27/2021	0	0	0
☐ FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐ Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0
☐ P10GroupTest		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

Page: 1 of 4

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- The table is sortable and has pagination according to the number of records. There are 10 records per page and the headers are clickable to sort the records. As you can see in the next image the records were sorted by Permission Sets.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 8:35 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 1

☐	Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inacti...	Permission Sets
☐	FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐	TestGroup1	Test	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	0	0	3
☐	ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐	Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0
☐	Zote Group Test ST		Updated	Arkus Developer	09/29/2021	Arkus Developer	09/29/2021	2	0	0
☐	AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

Page: 1 of 4

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Besides sorting with the headers, you can filter records by using the "List Views" dropdown.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 8:35 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 1

☒ All Permission Set Group Assignments
☐ Only Permission Sets Groups with Active Users = 0
☐ Only Permission Sets Groups with Inactive Users = 0
☐ Only Permission Sets Groups with Permission Sets = 0

☐	Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inacti...	Permission Sets
☐	FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐	TestGroup1	Test	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	0	0	3
☐	ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐	Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0
☐	Zote Group Test ST		Updated	Arkus Developer	09/29/2021	Arkus Developer	09/29/2021	2	0	0
☐	AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

Page: 1 of 4

vascript:void(0)

- Each row contains a checkbox to select the row and execute one of the clean up actions. You can navigate through the different pages and select rows from any page.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 9:36 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 1

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive U...	Permission ...
☒ Pine Group		Updated	Arkus Developer	09/23/2021	Arkus Developer	10/01/2021	10	15	0
☐ AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐ DDD GROUP TES...		Updated	steven galindo	09/27/2021	steven galindo	09/27/2021	0	0	0
☐ FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐ lalalala	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0

Page: 1 of 4

You may also click on "Deselect All" to uncheck all the records you selected through the pages.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 9:36 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 1

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive U...	Permission ...
☐ Pine Group		Updated	Arkus Developer	09/23/2021	Arkus Developer	10/01/2021	10	15	0
☐ AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐ DDD GROUP TES...		Updated	steven galindo	09/27/2021	steven galindo	09/27/2021	0	0	0
☐ FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐ lalalala	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0

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- If you want to delete the inactive users from a Permission Set Group, you may select records with at least 1 inactive user. Once you select records with at least 1 inactive user, you may click the "Delete Permission Set Group Assignments To Inactive Users" button to delete the current inactive users assigned to the Permission Set Groups selected.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 9:36 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 1

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive U... ↓	Permission ...
☒ Pine Group		Updated	Arkus Developer	09/23/2021	Arkus Developer	10/01/2021	10	15	0
☐ AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☐ DDD GROUP TES...		Updated	steven galindo	09/27/2021	steven galindo	09/27/2021	0	0	0
☐ FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐ lalalala	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0

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A message window will then appear asking to confirm if you want to delete the inactive users for the selected Permission Set Groups. Click Yes to proceed.

Warning

The following action will delete Permission Set Group Assignments ONLY to Inactive Users for the selected Permission Set Groups. Permission Set Group Assignments to Active Users for the selected Permission Set Groups will remain intact. If you wish to remove the Permission Set Group Assignments to Active Users please use the Revoke tab.

Do you wish to delete Permission Set Group Assignments ONLY to Inactive Users for the selected Permission Set Groups?

No
Yes

- Now a message will be shown at the top of the subtab letting you know that the process is running and an email will be sent when it finishes.

Assign
Revoke
Permission Set Usage
Instructions

Permission Sets
Permission Set Groups

The results are being calculated. You will receive an email at developer@arkusinc.com when the calculation is complete.

LIST VIEWS
All Permission Set Group Assignments

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 0

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive U...	Permission ...
Page: 1 of 0									

After the email is received, the “Permission Set Groups” subtab can be refreshed and a message will be shown indicating the last time the process was executed. You can check the records you previously selected and see how the inactive users count is now 0.

Permission Sets
Permission Set Groups

Last date this data was calculated was 10/1/2021 9:45 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS
Only Permission Sets Groups with Inactive Users = 0

Deselect All
Analyze Permission Set Group Usage
Delete Permission Set Group Assignments to Inactive Users
Delete Permission Set Groups

Active Users 1
Inactive Users 0

Permission ...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users	Permission ...
☐	P7GroupTest	Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐	P8GroupTest	Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐	P9GroupTest	Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐	Pine Group	Updated	Arkus Developer	09/23/2021	Arkus Developer	10/01/2021	10	0	0
☐	PPGroup	Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐	QQGroup	Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

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9. You may also select some records and click the "Delete Permission Set Groups" button.

Permission Sets **Permission Set Groups**

Last date this data was calculated was 10/1/2021 9:45 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS: All Permission Set Group Assignments

[Deselect All](#)
[Analyze Permission Set Group Usage](#)
[Delete Permission Set Group Assignments to Inactive Users](#)
[Delete Permission Set Groups](#)

Active Users 1
Inactive Users 1

Permission...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users	Permission ...
☐ AAGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ ABCGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	196	0	0
☒ DDD GROUP T...		Updated	steven galindo	09/27/2021	steven galindo	09/27/2021	0	0	0
☐ FirstGroup	Test Group of Per...	Failed	Justin Edelstein	04/08/2019	steven galindo	09/30/2021	0	0	191
☐ lalalala	a	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	2	0	0
☐ P10GroupTest		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

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Permission Sets **Permission Set Groups**

Last date this data was calculated was 10/1/2021 9:45 am.
Please run the "Analyze Permission Set Group Usage" before you proceed to make any change to ensure you are working with the most recent information.

LIST VIEWS: All Permission Set Group Assignments

[Deselect All](#)
[Analyze Permission Set Group Usage](#)
[Delete Permission Set Group Assignments to Inactive Users](#)
[Delete Permission Set Groups](#)

Active Users 1
Inactive Users 1

Permission...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users	Permission ...
☐ Pine Group		Updated	Arkus Developer	09/23/2021	Arkus Developer	10/01/2021	10	0	0
☐ PPGGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ QQGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0
☐ TestGroup1	Test	Updated	Arkus Developer	10/16/2019	Arkus Developer	10/16/2019	0	0	3
☒ Zote Group Tes...		Updated	Arkus Developer	09/29/2021	Arkus Developer	09/29/2021	2	0	0
☐ ZZGroup		Updated	Arkus Developer	09/23/2021	Arkus Developer	09/23/2021	0	0	0

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[>](#)

A message window will then appear asking to confirm if you want to delete the selected Permission Set Groups. Click Yes to proceed. **Note:** This action will delete the Permission Set Groups even if they currently have active users assigned.



The following action will delete the selected Permission Set Groups. This action is not reversible.
Are you sure you want to proceed?

Yes

Permission Sets

Permission Set Groups

The results are being calculated. You will receive an email at developer@arkusinc.com when the calculation is complete.

LIST VIEWS

All Permission Set Group Assignments

Deselect All

Analyze Permission Set Group Usage

Delete Permission Set Group Assignments to Inactive Users

Delete Permission Set Groups

Active Users

Inactive Users

☐	Permission...	Description	Status	Created By	Created Date	Last Modifie...	Last Modifie...	Active Users	Inactive Users	Permission ...
Page: 1 of 0 < < Prev Next > >										

Reports on Permission Sets and Permission Set Groups

www.arkusinc.com

Reports						
All Folders						
1 item						
Search all folders... New Report New Report (Salesforce Classic) New Folder						
REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date	
Recent	Permissioner Reports	Arkus Developer	9/28/2021, 10:44 AM	Arkus Developer	9/28/2021, 10:44 AM	
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						

Reports						
All Folders > Permissioner Reports						
7 items						
Search all folders... New Report New Report (Salesforce Classic) New Folder						
REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Permission Sets with Inactive Users= 0	Only Permission Sets with Inactive Users = 0	Permissioner Reports	Arkus Developer	9/28/2021, 11:23 AM	
Created by Me	Permission Set Assignment Totals	All Permission Set Assignment Totals	Permissioner Reports	Arkus Developer	9/28/2021, 11:12 AM	
Private Reports	Permission Set Group Assignment Totals	All Permission Set Group Assignment Totals	Permissioner Reports	Arkus Developer	9/28/2021, 11:14 AM	
Public Reports	Permission Sets with Active Users= 0	Only Permission Sets with Active Users = 0	Permissioner Reports	Arkus Developer	9/28/2021, 11:20 AM	
All Reports	PermissionSetGroups with Active Users= 0	Only Permission Set Groups with Active Users = 0	Permissioner Reports	Arkus Developer	9/28/2021, 11:29 AM	
FOLDERS	PermissionSetGroups with InactiveUsers=0	Only Permission Set Groups with Inactive Users = 0	Permissioner Reports	Arkus Developer	9/28/2021, 11:32 AM	
All Folders	PermissionSetGroups with PermissionSet=0	Only Permission Set Groups with Permission Sets = 0	Permissioner Reports	Arkus Developer	9/28/2021, 11:34 AM	
Created by Me						
Shared with Me						

Reports for the Permission Set Usage object

The following fields will be displayed for this type of reports:

- Permission Set Name
- Description
- License:
- Session Activation Required
- Created By (date and user)
- Last Modified By (date and user)
- Active Users: count of Permission Set Assignments to active users
- Inactive Users: count of Permission Set Assignments to inactive users

1. The report "Permission Set Assignment Totals" will list **All the Permission Sets** without any filter.

REPORT ▼

Permission Set Assignment Totals / **Permission Set Usage**

Got Feedback?    Add Chart  Save & Run  Save ▼  Close  Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically 

	Permission Set Name	Description	License	Session Activation Required	Permission Created By: Full Name	Permission Created Date	Permission L
1	Permission 226	Permission 226	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
2	Permission 227	Permission 227	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
3	Permission 228	Permission 228	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
4	Permission 229	Permission 229	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
5	Permission 230	Permission 230	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
6	Permission 231	Permission 231	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo

2. The report “Permission Sets With Inactive Users=0” will list all the Permission Sets that have **0 Inactive Users** assigned.

REPORT ▼

Permission Sets with Inactive Users= 0 / **Permission Set Usage**

Got Feedback?    Add Chart  Save & Run  Save ▼  Close  Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically 

	Permission Set Name	Description	License	Session Activation Required	Permission Created By: Full Name	Permission Created Date	Permission
1	Permission 310	Permission 310	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
2	Permission 75	Permission 75	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
3	Permission 74	Permission 74	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
4	Permission 76	Permission 76	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
5	Permission 77	Permission 77	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
6	Permission 78	Permission 78	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
7	Permission 79	Permission 79	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo

3. The report “Permission Sets With Inactive Users=0” will list all the Permission Sets that have **0 Active Users** assigned.

REPORT ▼

Permission Sets with Active Users=0 / **Permission Set Usage**

Got Feedback?    Add Chart  Save & Run  Save ▼  Close  Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically 

	Permission Set Name	Description	License	Session Activation Required	Permission Created By: Full Name	Permission Created Date	Permission L
1	Permission 425	Permission 425	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
2	Permission 426	Permission 426	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
3	Permission 430	Permission 430	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
4	Permission 431	Permission 431	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
5	Permission 432	Permission 432	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
6	Permission 433	Permission 433	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo
7	Permission 444	Permission 444	Salesforce	☐	Arkus Developer	07/11/2012	Arkus Develo

Reports for the Permission Set Group Usage Object

The following fields will be displayed for this type of reports:

- Permission Set Group Name
- Description
- Status
- Created By (date and user)

- Last Modified By (date and user)
 - Active Users: count of Permission Set Group Assignments to active users.
 - **Note:** these are users assigned directly to the Permission Set Group, it does NOT count the users assigned to the Permission Sets included in the Permission Set Group.
 - Inactive Users: count of Permission Set Group Assignments to inactive users.
 - **Note:** these are users assigned directly to the Permission Set Group, it does NOT count the users assigned to the Permission Sets included in the Permission Set Group.
 - Permission Sets: count of Permission Sets included in the Permission Set Group
1. The report “Permission Set Group Assignment Totals” will list **All the Permission Set Groups** without any filter.

REPORT ▼
Permission Set Group Assignment Totals / **Permission Set Group Usage**

Got Feedback? ↶ ↷ Add Chart Save & Run Save ▼ Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Permission Set Group Name	Description	Status	Permission Group Created By: Full Name	Permission Group Created Date	Permission Group
1 AAGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
2 ABCGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
3 FirstGroup	Test Group of Permissioners	Failed	Justin Edelstein	04/08/2019	steven galindo
4 Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer
5 P10GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer

2. The report “PermissionSetGroups with InactiveUsers=0” will list all the Permission Set Groups that have **0 Inactive Users** assigned.

REPORT ▼
PermissionSetGroups with InactiveUsers=0 / **Permission Set Group Usage**

Got Feedback? ↶ ↷ Add Chart Save & Run Save ▼ Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Permission Set Group Name	Description	Status	Permission Group Created By: Full Name	Permission Group Created Date	Permission Group
1 AAGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
2 ABCGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
3 FirstGroup	Test Group of Permissioners	Failed	Justin Edelstein	04/08/2019	steven galindo
4 Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer
5 P10GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
6 P17GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
7 P1GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer

3. The report “PermissionSetGroups with Active Users= 0” will list all the Permission Set Groups that have **0 Active Users** assigned.

REPORT ▼

PermissionSetGroups with Active Users=0 / **Permission Set Group Usage**

Got Feedback? ↺ ↻ Add Chart Save & Run Save Close Run

Outline Filters 1 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Permission Set Group Name	Description	Status	Permission Group Created By: Full Name	Permission Group Created Date	Permission Group
1 AAGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
2 FirstGroup	Test Group of Permissioners	Failed	Justin Edelstein	04/08/2019	steven galindo
3 P10GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
4 P17GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
5 P1GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
6 P21GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
7 P23GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer

4. The report “PermissionSetGroups with PermissionSet=0” will list all the Permission Set Groups that have **0 Permission Sets** assigned.

REPORT ▼

PermissionSetGroups with PermissionSet=0 / **Permission Set Group Usage**

Got Feedback? ↺ ↻ Add Chart Save & Run Save Close Run

Outline Filters 1 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Permission Set Group Name	Description	Status	Permission Group Created By: Full Name	Permission Group Created Date	Permission Group Last Modified
1 AAGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
2 ABCGroup	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
3 Finn Group	a	Updated	Arkus Developer	10/16/2019	Arkus Developer
4 P10GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
5 P17GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
6 P1GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer
7 P21GroupTest	-	Updated	Arkus Developer	09/23/2021	Arkus Developer

Accessing The Permissioner from Salesforce Mobile

Once Mobile Permissioner is added to your Salesforce Mobile Navigation Items you can assign and revoke permissions directly from your mobile device. If you haven't added Mobile Permissioner to your Mobile Navigation Items please follow the steps outlined in The Permissioner - Installation Guide for Lightning.

To Assign Permissions from your Mobile Device

1. Open the Menu on Salesforce Mobile and Select Mobile Permissioner
2. Make sure you are in the Assign tab at the top of your screen
3. Search for the permission you would like to Assign
4. Select the checkbox next to the permissions
5. Search for the User you would like to Assign the permissions to
6. Select the checkbox next to the User you would like to assign the permission to
7. Click Assign
8. Confirm

To Revoke Permissions from Salesforce Mobile

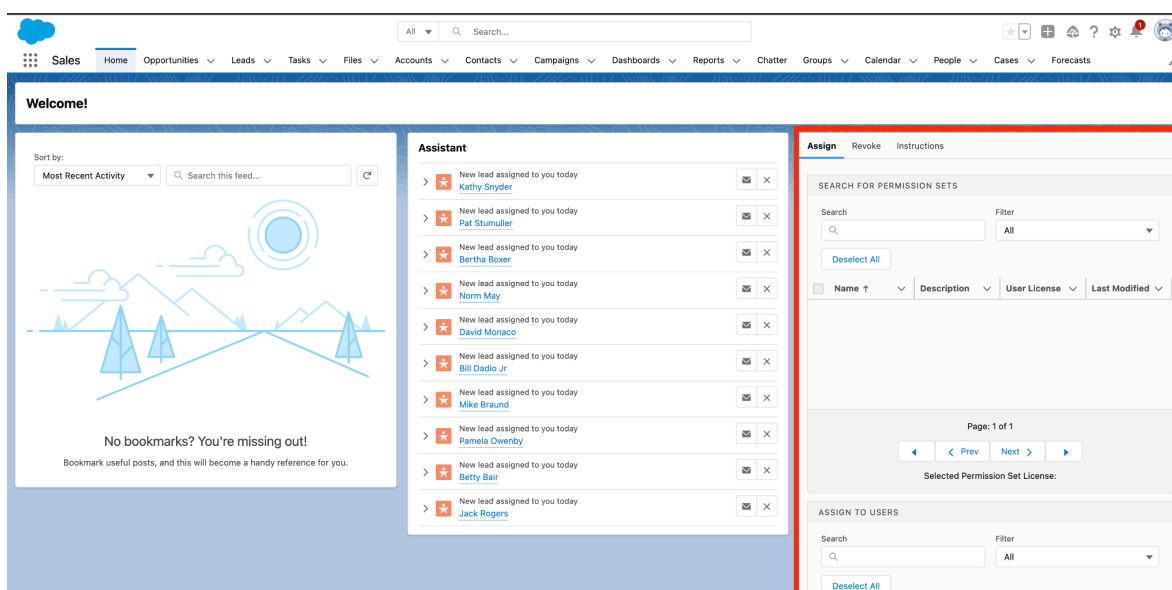
1. Open the Menu on Salesforce Mobile and Select Mobile Permissioner
2. Make sure you are in the Revoke tab at the top of your screen
3. Search for the permission you would like to Revoke
4. Select the checkbox next to the permissions
5. Search for the User you would like to Revoke the permissions from
6. Select the checkbox next to the User you would like to revoke the permission from
7. Click Revoke
8. Confirm

Accessing The Permissioner from the Lightning Page Component

You can add The Permissioner to any Lightning Page by dragging and dropping the component to the page. For more details on installation, please check out our Installation Guide for Lightning. Adding the component to a Lightning Page will allow you to assign or revoke permissions directly from the component. The instructions to assign or revoke permissions are the same as mentioned above.

To Assign Permissions from the Lightning Component:

1. Locate the component on the page



2. Select the appropriate tab depending on whether you want to Revoke or Assign the permissions

Assign
Revoke
Instructions

SEARCH FOR PERMISSION SETS

Search
Filter
All
Deselect All

☐ Name ↑
Description
User License
Last Modified

Page: 1 of 1
<
< Prev
Next >
>

Selected Permission Set License:

ASSIGN TO USERS

Search
Filter
All
Deselect All

☐ N ↑
E...
U...
U...
R...
P...
Ti...
Active

3. Search for and Select the Permission Set you want to Assign Access to

Assign
Revoke
Instructions

SEARCH FOR PERMISSION SETS

Search
Filter
All
Deselect All

☒ The_Permissioner_Per...
Contains user permis...
Salesforce
Aug 19, 2021

Filtering out Users this Permission Set is assigned to
Page: 1 of 1
<
< Prev
Next >
>

Selected Permission Set License: Salesforce

4. Search for and Select the User you want to Assign Access to the Permission Set for and Select Assign

ASSIGN TO USERS

Search

Filter

All

Deselect All

☐	N... ↑ ↓	Email ↓	Use... ↓	Use... ↓	Role ↓	Prof... ↓	Title ↓	Active
☒	Test Test...	testteste...	testteste...	Salesforce	CEO	Marketin...		✓

Filtering out Permission Sets that the user already belongs to

Page: 1 of 1

<

< Prev

Next >

>

Selected Permission Set License: Salesforce

Assign

5. Review and Confirm Assignment

Confirm Assignment

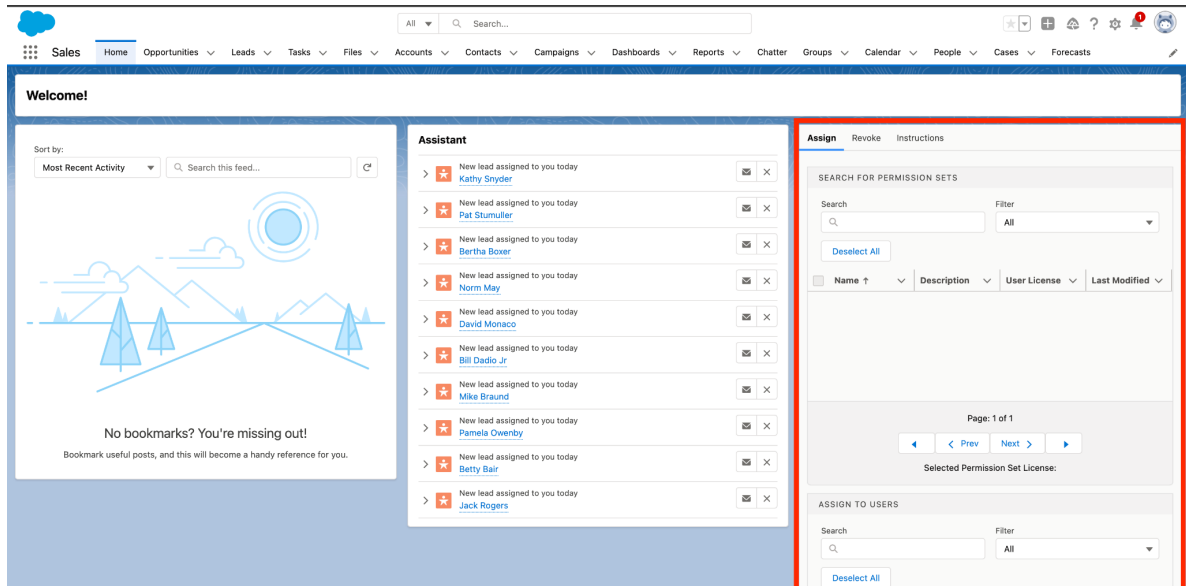
You are about to assign 1 Permission Sets to 1 Users.

Cancel

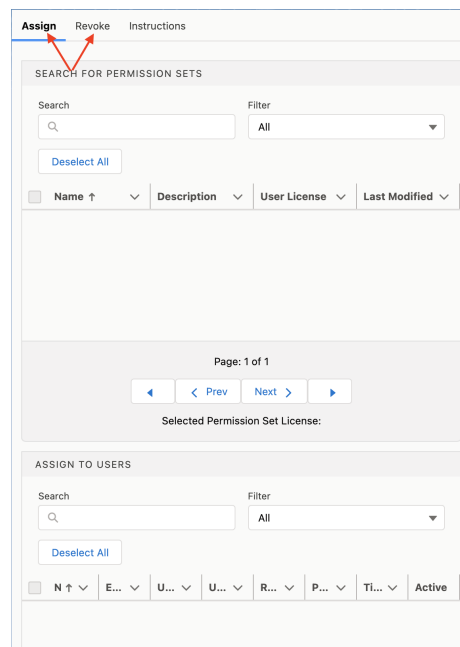
Assign

To Revoke Permissions from the Lightning Component:

1. Locate the component on the page



2. Select the appropriate tab depending on whether you want to Revoke or Assign the permissions



3. Search for and Select the Permission Set you want to Revoke Access to

Assign **Revoke** Instructions

SEARCH FOR PERMISSION SETS

Search Filter

[Deselect All](#)

Name	Number of U...	Description	User License	Last Modified
The_Permissioner...	2	Contains user per...	Salesforce	Aug 19, 2021

4. Search for and Select the User you want to Revoke Access to the Permission Set for and Select Revoke

REVOKE FROM USERS

Search Filter

[Deselect All](#)

	N...	Email	Use...	Use...	Role	Prof...	Title	Active
☒	Test Test...	testteste...	testteste...	Salesforce	CEO	Marketin...		✓
☐	Zaris Mota	zaris.mo...	zaris.mo...	Salesforce		System ...		✓

Page: 1 of 1

[Reset](#) [Revoke](#)

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5. Review and Confirm Revocation

Confirm Revocation

Are you sure you want to remove 1 Permissions Sets from 1 Users?
An email notification will be sent with a summary of this change.

[Cancel](#) [Revoke](#)

Known Limitations

The Permissioner can handle up to 1,000 Permission Set Assignments at a time. One assignment is one matching of a selected Permission Set to a User. For example, selecting 2 Permission Sets will allow you to select 500 Users, as the product of these numbers is 1,000 assignments.

When searching for a Permission Set and using the Individual Permissions filter, some system permissions are not queryable due to a Salesforce limitation. The list of these permissions is below. Be sure to include these as part of the name of the Permission Set, or make note of these when you are performing assignments.

Permissions that are not queryable due to Salesforce limitations:

Chatter Internal User	Manage Public List Views
Create and Own New Chatter Groups	Manage Public Reports
Edit HTML Templates	Manage Public Templates
Export Reports	Mass Email
Invite Customers To Chatter	Moderate Chatter
Manage Billing	Send Email
Manage Letterheads	View Encrypted Data
Manage Package Licenses	

Provide Arkus Feedback

If you need additional support or have an issue to share with us, please reach out to support@arkusinc.com so we can assist you. You can also let us and others know how The Permissioner is working for you in a review on the Salesforce AppExchange. We appreciate your feedback. We are continually building upon The Permissioner to increase its functionality and usefulness.

If you are interested in learning more about Arkus, visit us at www.arkusinc.com or contact us at www2.arkusinc.com/contact.

You can learn more about our other free app, Clone This User, at www.clonethisuser.com.