

The Permissioner - Installation 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 other security documentation.

The Permissioner - Installation Guide for Lightning	1
Overview	1
Technical Requirements	1
Support	2
Installation Steps	2
Lightning Component	8
Mobile Setup in Lightning	10
Grant Access to Non-Admin Users	11
Provide Arkus Feedback	12

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. Standard Salesforce functionality allows administrators to assign permission sets to a single user at a time.

The Permissioner dramatically reduces the time and frustration involved with creating and assigning permission sets 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. Without this application, administrators are forced to navigate to each individual user record to assign a permission set. With The Permissioner, life is made easy by assigning a permission set to as many users as needed from one intuitively simple screen.

Technical Requirements

Salesforce.com Supported Versions: Enterprise Edition, Unlimited Edition, Developer Edition, and Performance Edition.



Support

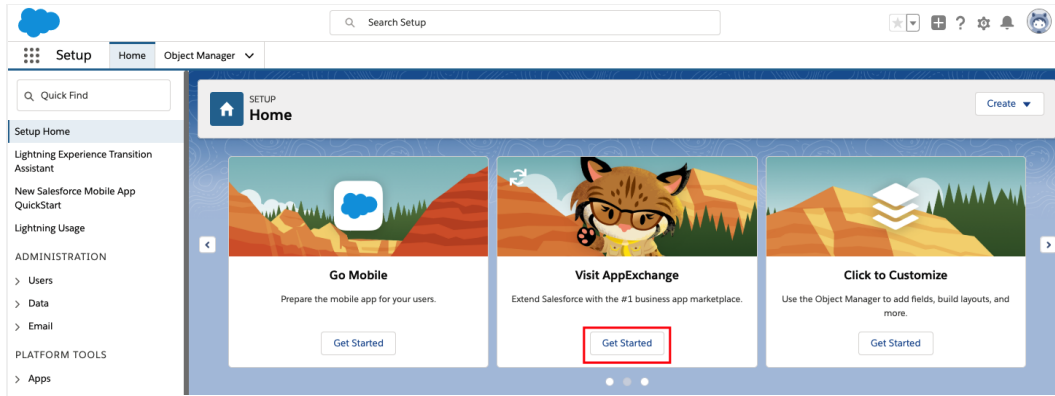
For support related to The Permissioner, you can email support@arkusinc.com or call (888) 271-1963 and leave a message with any questions or issues.

Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install The Permissioner, follow the instructions below.

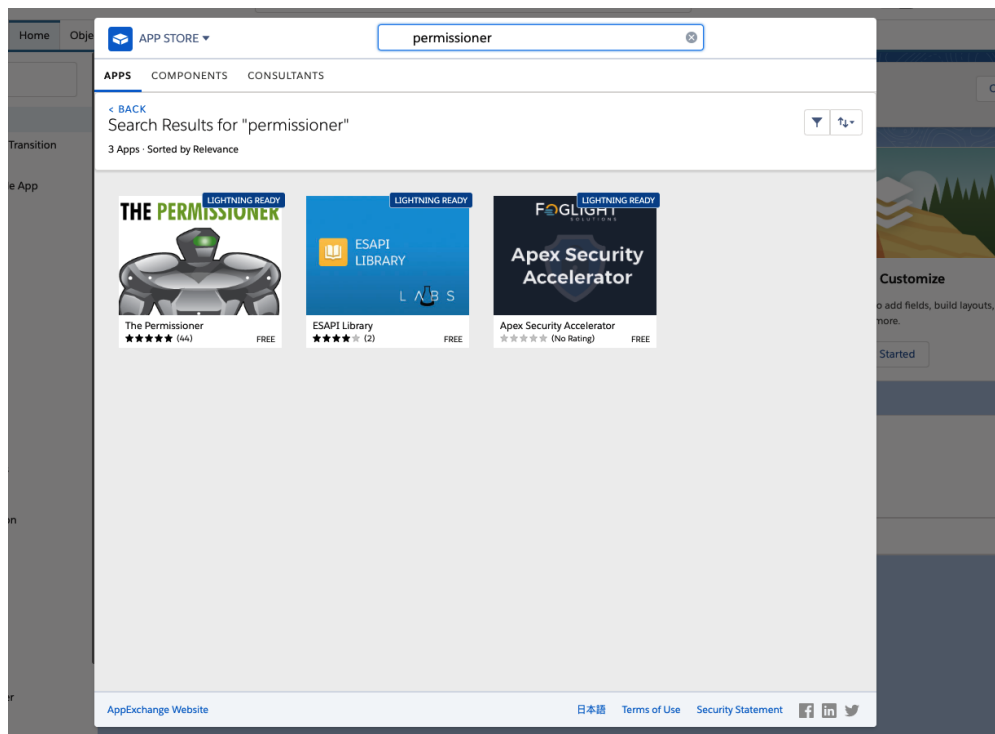
Please note: If you already have the Permissioner installed and are looking to upgrade to lightning, you will first need to uninstall the Permissioner and then follow these steps. Please review [this documentation](#) from Salesforce regarding uninstalling a package.

1. Navigate to the set up menu from your production instance. Click **Get Started** on the Visit AppExchange component.



2. In the search bar, type in "Permissioner" and hit Enter.

3. Click on the Permissioner tile.





4. You will now see the details of the Permissioner. Click the blue **Get It Now** button.

APP STORE

Search AppExchange

< BACK

The Permissioner

Permission Sets Made Easy

by Arkus, Inc.

★★★★★

Free

DETAILS

REVIEWS

PROVIDER

The Permissioner - Summer 14 Demo

Free

The Permissioner dramatically reduces the time involved with assigning and revoking permission sets 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.

Read More

Highlights

- Mass assign & revoke Permission Set assignments from multiple users in seconds.
- Intuitive interface allows administrators to search for Permission Sets and users in list views.
- Process up to 1,000 assignments in a matter of seconds with the power of Apex DML.

Contact Information

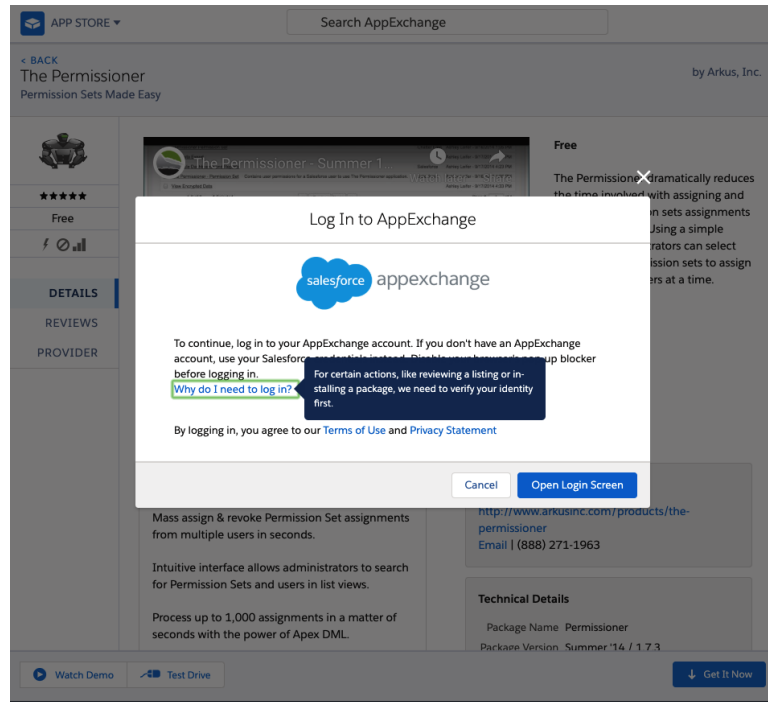
<http://www.arkusinc.com/products/the-permissioner>
Email | (888) 271-1963

Technical Details

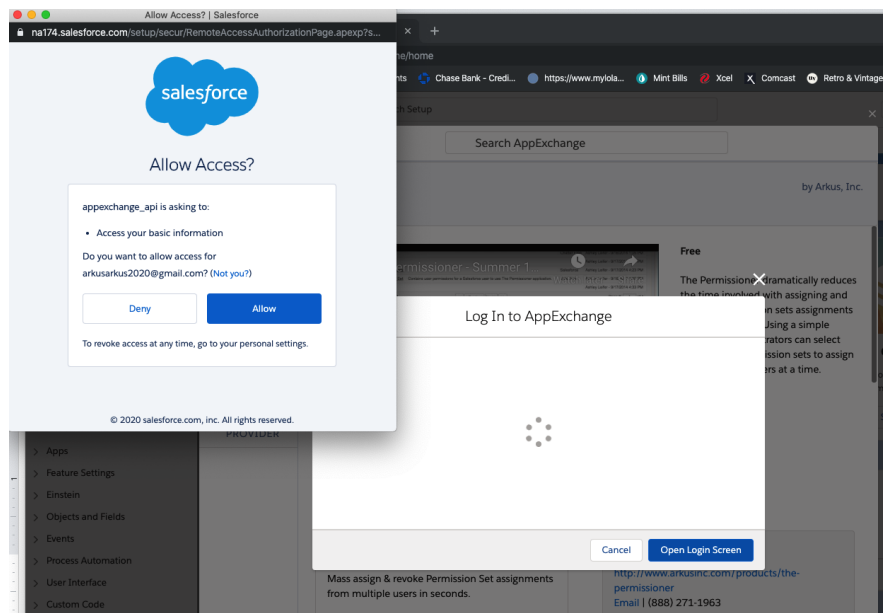
Package Name: Permissioner
Package Version: Summer '14 / 1.7.3

Watch Demo Test Drive Get It Now

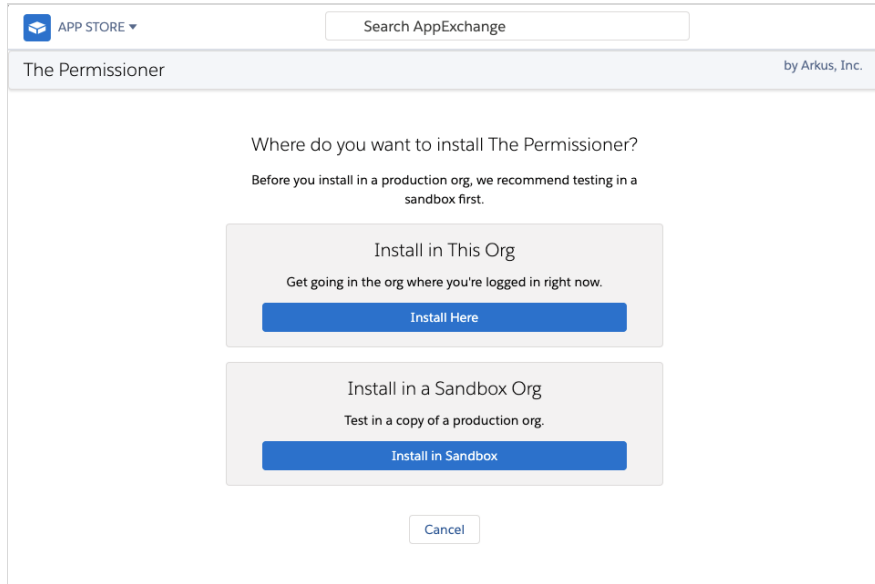
5. You will be prompted to the Open Login screen. Since you are already logged in, this connection will automatically connect. Click the blue **Open Login Screen** button.



6. Click the blue **Allow** button.

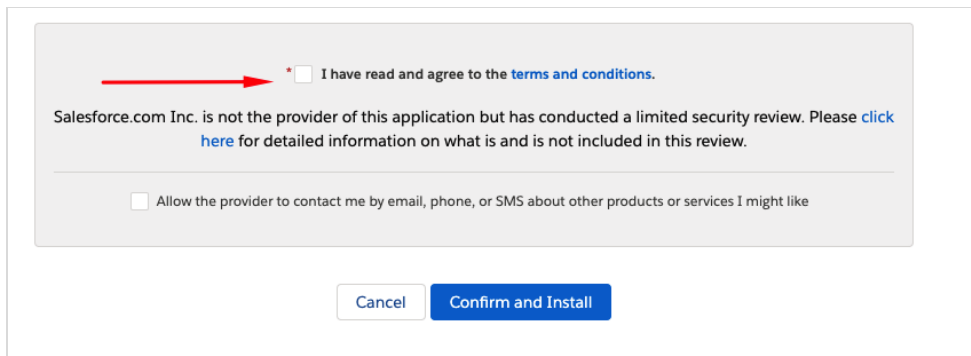


7. You will now be prompted to select the environment where you would like to install the package. We recommend that you install The Permissioner to your Sandbox environment to test and evaluate the application before installing it in Production.



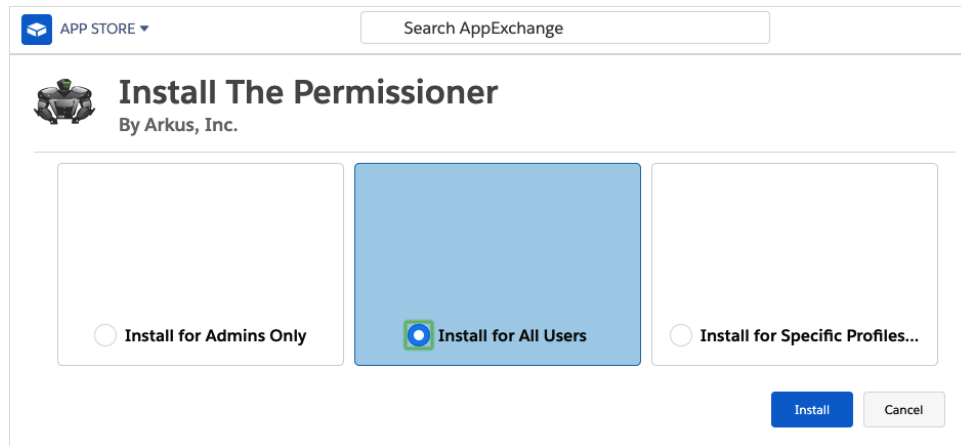
The screenshot shows the Salesforce App Store interface. At the top, there's a search bar labeled 'Search AppExchange' and a dropdown menu showing 'APP STORE'. Below this, the app name 'The Permissioner' is displayed, followed by 'by Arkus, Inc.'. The main content area asks 'Where do you want to install The Permissioner?' and provides a recommendation: 'Before you install in a production org, we recommend testing in a sandbox first.' There are two main options: 'Install in This Org' with the subtext 'Get going in the org where you're logged in right now.' and 'Install in a Sandbox Org' with the subtext 'Test in a copy of a production org.' Each option has a blue button labeled 'Install Here' or 'Install in Sandbox'. A 'Cancel' button is at the bottom.

8. You may be prompted to fill out some more personal detailed information and you will need to agree to the terms and conditions. Click **Confirm and Install**.



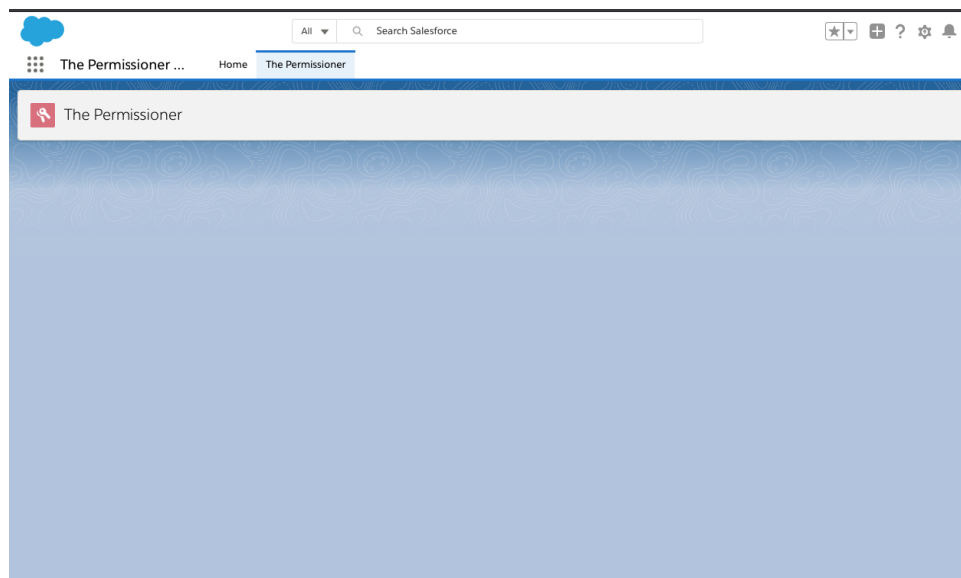
The screenshot shows a terms and conditions agreement screen. At the top, there's a red arrow pointing to a checkbox labeled 'I have read and agree to the [terms and conditions](#).' Below this, a paragraph states: 'Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.' There's another checkbox labeled 'Allow the provider to contact me by email, phone, or SMS about other products or services I might like'. At the bottom, there are two buttons: 'Cancel' and 'Confirm and Install'.

9. For testing, you can install it for all users. Upon installation to your Production environment, it is best practice to limit who uses the tool.



10. When the install is complete, click **Done**. The Permissioner is now installed in your org. Congratulations!

11. After install, if you see this, it means you need to set up My Domain in your instance. After you have set that up and it has verified, you will see the entire app.



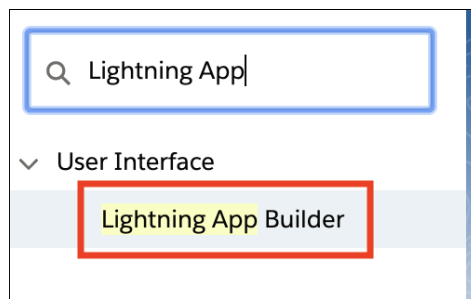
12. How to set up [My Domain](#)

Lightning Component

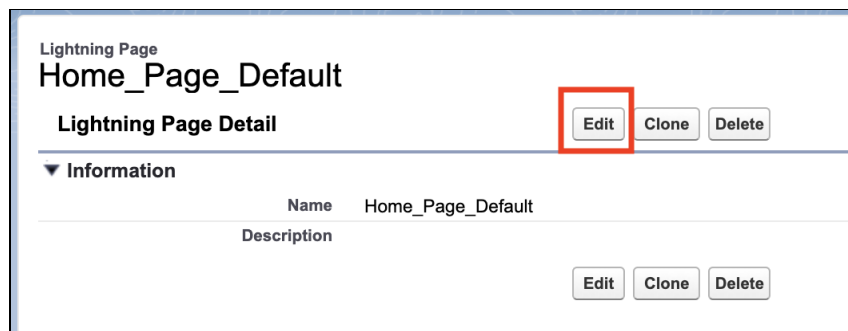
With our Lightning release, you can now add The Permissioner to any Lightning page. We recommend the Home page for those Users who are managing permissions often.

Note: You will need to enable My Domain to utilize any Custom Lightning Component. To learn how to enable My Domain, [view Salesforce's documentation here](#).

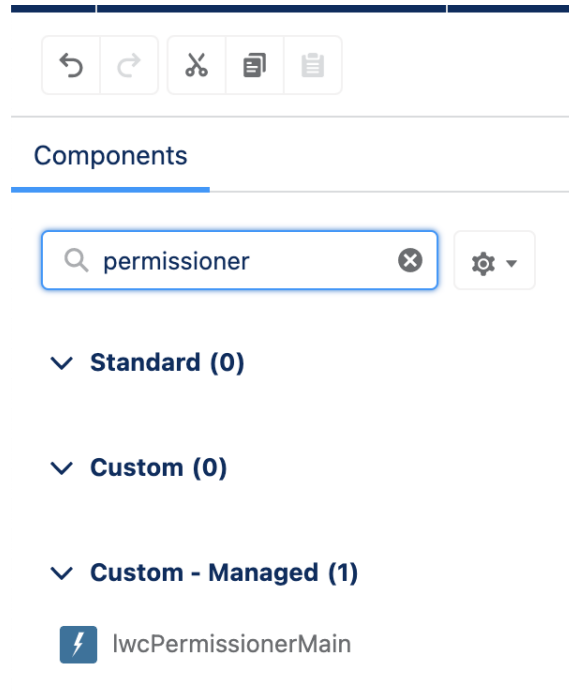
1. In Setup → search for and select “Lightning App Builder”



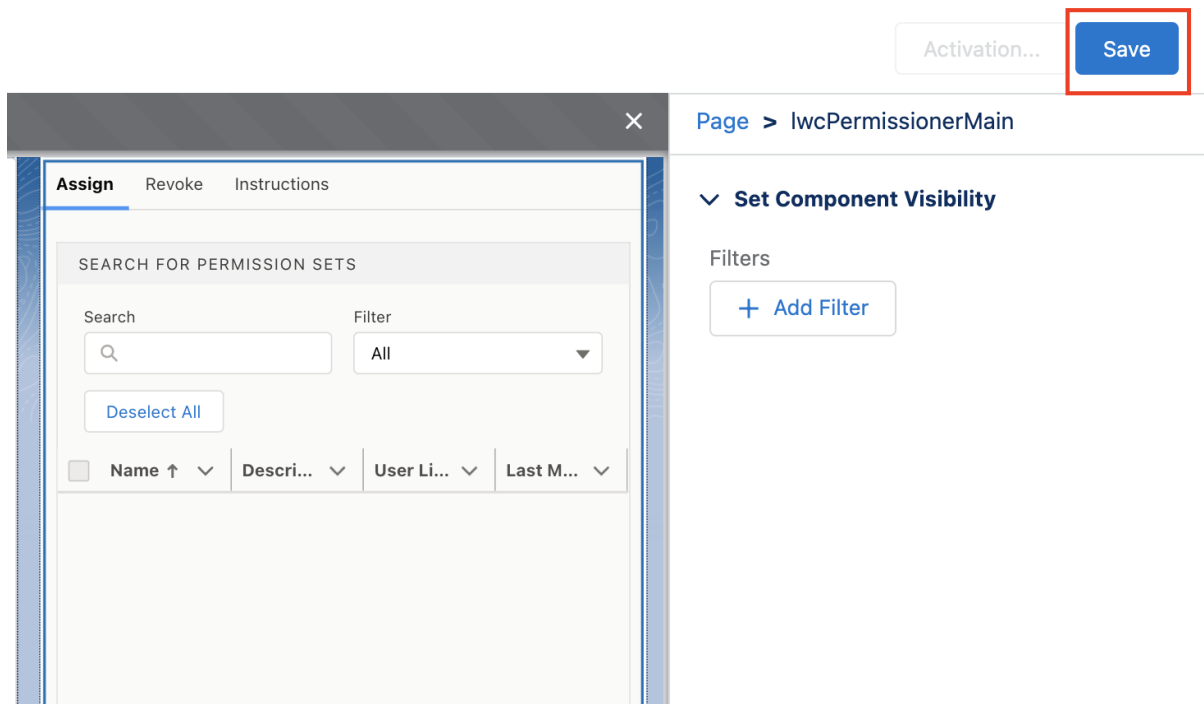
2. Select the Lightning page where you need to add The Permissioner
3. Click “Edit”



4. Under “Custom”, locate “lwcPermissionerMain”
 - The acronym “lwc” stands for Lightning Web Component



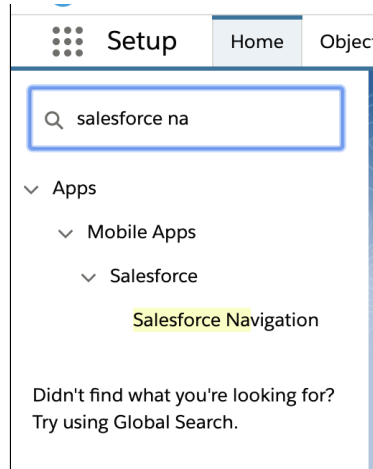
5. Drag the “lwcPermissionerMain” component to the page and click “Save”



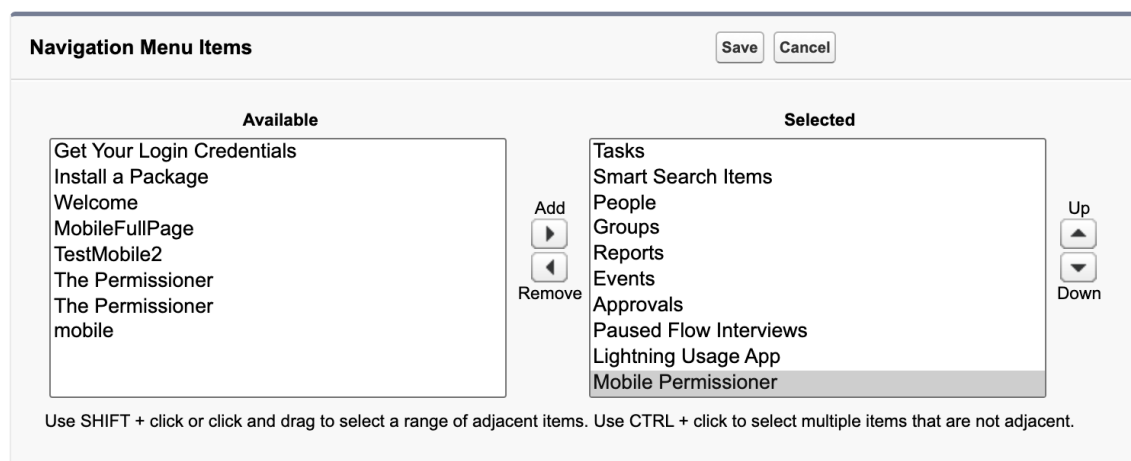
Mobile Setup in Lightning

Now that you've completed the install of the package, if you would like The Permissioner to be available on mobile devices, you'll need to follow these steps:

1. In the Setup → search for and select “Salesforce Navigation”



2. Under Salesforce Navigation, you will see Navigation Menu Items
3. Select “Mobile Permissioner” from the “Available” side and, between the two boxes under “Add”, click the arrow pointing right to move it to the “Selected” side
4. Click “Save”



Grant Access to Non-Admin Users

If a Non-System Administrator user needs to use The Permissioner, they must be assigned a Permission Set to gain access to the necessary components. You also need to follow these steps for any other delegated admins.

1. Setup → “Users” → “Permission Sets”
 - Or search “Permission Sets”
2. Search for the “The Permissioner - Permission Set” Permission Set Label and select it.
3. Select the “Manage Assignments” button.

Permission Set
The Permissioner - Permission Set

Find Settings... Clone Edit Properties **Manage Assignments**

Permission Set Overview

Description	Contains user permissions for a Salesforce user to use The Permissioner application.	API Name	The_Permissioner_Permission_Set
License	Salesforce	Namespace Prefix	permissioner
Session Activation Required	☐	Created By	Justin Edelstein, 9/16/2012 3:14 PM
Last Modified By	Justin Edelstein, 9/16/2012 3:15 PM		

4. Select the “Add Assignments” button and select the corresponding users:

Assigned Users
The Permissioner - Permission Set

Back to: Permission Set

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Add Assignments Remove Assignments

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
☐ Edit Login	Leifer, Ashley	aleif	ashley.leifer	4/29/2020 2:18 PM	Associate	☒		

Add Assignments Remove Assignments

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Assign Users
Active Users

View: Active Users Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Assign Cancel

Action	Full Name	Alias	Username	Last Login	Profile	Role
☒ Edit Login	Adams, Linda	ladam	linda.adams	4/29/2020 8:54 AM		
☐ Edit Login	Bucciferro, Amy	abuoc	amy.bucciferro	4/29/2020 1:01 PM		
☒ Edit Login	Bujold, James	jbuio	james.bujold	4/29/2020 5:34 PM		

5. Once you are done selecting the users, click the “Assign” button.
6. Click Done.



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.