

The Permissioner - User Guide for Classic

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 - User Guide for Classic	1
Overview	1
Release Notes - Version 3.0 (Winter 22)	1
Using The Permissioner	2
Assigning Permission Sets	2
Revoking Permission Sets	4
Accessing The Permissioner from the Mobile Device	5
Known Limitations	6
Provide Arkus Feedback	6

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 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. 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 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:

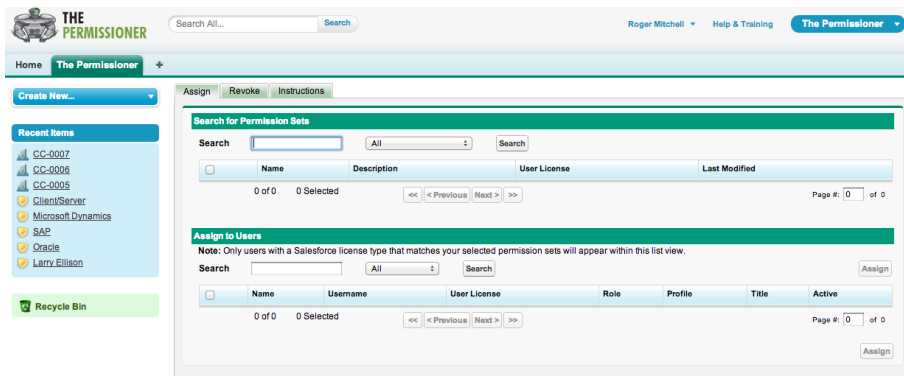
- Update UserLicense to LicenseId.
- Security fixes.

Using The Permissioner

During installation, The Permissioner package 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 3 sub tabs for mass assignment, mass revocation, and an instructions sheet. The Assign and Revoke tabs both have lists views, and from here you will find Permission Sets and users.

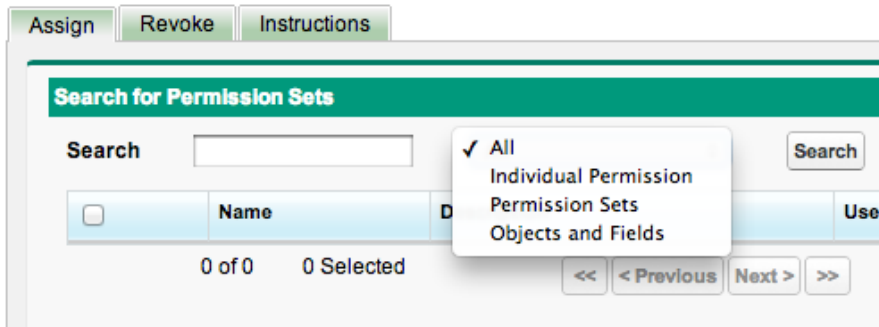
Note: If you have Send Apex Warning Emails checked on your user record, you will receive an email notifying you of a SOQL Query Warning. This is normal and does not impact the performance of The Permissioner or your Salesforce org.



The screenshot shows the 'The Permissioner' app interface. The top navigation bar includes the app logo, a search bar, and user information (Roger Mitchell). The main content area is divided into two sections: 'Search for Permission Sets' and 'Assign to Users'. Both sections have a search bar and a table of results. The 'Search for Permission Sets' table has columns for Name, Description, User License, and Last Modified. The 'Assign to Users' table has columns for Name, Username, User License, Role, Profile, Title, and Active. Both tables show 0 of 0 items selected.

Assigning Permission Sets

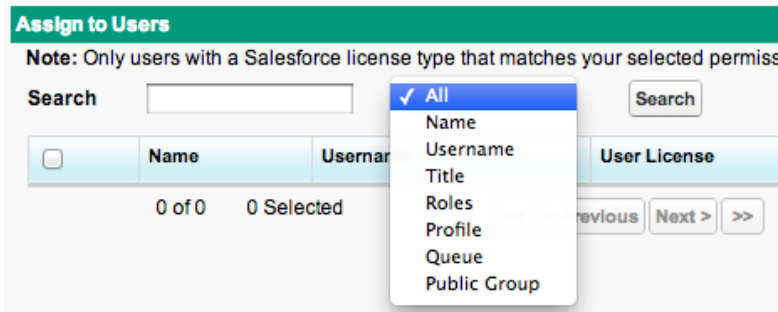
1. From the Search for Permission Sets list, you may search for terms either by the individual permission(s) included in the permission set, object and field security, or by the name of the permission set. Based on these results, you can choose to sort by its name, user license type, or the last modified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



2. Use the checkboxes in the far left column of the search results to select the permission sets that 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 that you wish to assign, you may use the buttons called Previous, Next, or the page number to select permission sets on additional pages.

3. 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, or a queue or public group of users. Use the sortable 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.



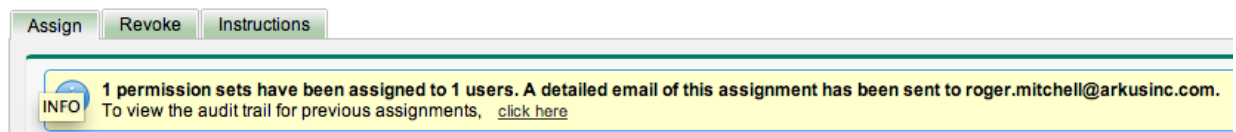
4. Use the checkboxes to select the users that you wish to assign the selected permission sets. The users must have a compatible license type with the permission sets that you have selected (e.g. you may not assign a permission set for a Customer Portal User license to a user with a Salesforce license). 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 called Previous, Next, or the page number 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

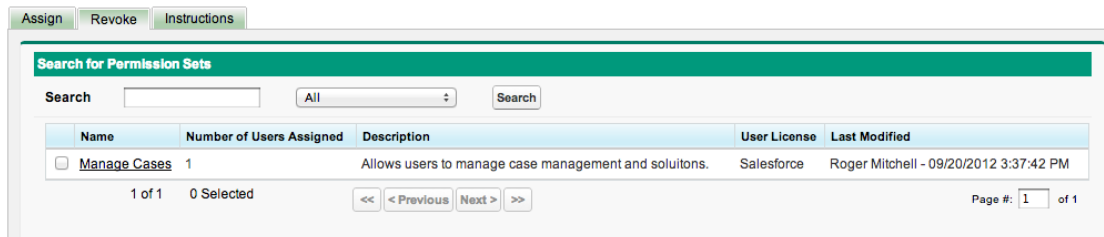
Search for Permission Sets section, then you can assign these to users of different license types. You may only assign Global Permission Sets by selecting the Permission Sets first, and then the users.

- After selecting the permission sets and users, click **Assign**. A message window will appear asking if you want to assign the number of permission sets to the number of users. Select **OK** to proceed.
- The Permissioner will complete the assignment and provide a notification on the page specifying the amount of assignments created. Also, an email will be sent to the user that is assigning the permission sets that summarizes the assignments in a table.



Revoking Permission Sets

- From the Search for Permission Sets list, results will automatically populate with Permission Sets that have at least one user assigned. 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.



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

Assigned Users

Note: Only users with the Permission Set you've selected above will appear in this list.

Search All

☐	Name	Username	User License
☐	test 17 User	test17@17test.com	Chatter Free
☐	test 18 User	test18@18test.com	Chatter Free
☐	test 19 User	test19@19test.com	Chatter Free
☐	test 20 User	test20@20test.com	Chatter Free
☐	test 21 User	test21@21test.com	Chatter Free
☐	test 22 User	test22@22test.com	Chatter Free

1-6 of 230 0 Selected << < Previous Next > >>

- Use the checkboxes to select the users that you wish to revoke the selected permission set.

Note: If you have more than 10 users that you wish to revoke, you may use the buttons called Previous, Next, or the page number to select users on additional pages.

- After selecting the permission set and users, click **Revoke**. A message window will appear asking if you want to revoke the number of permission sets to the number of users. Select **OK** to proceed.
- 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.

Assign Revoke Instructions

1 Permission Set has been revoked from 6 users. A detailed email of this assignment has been sent to justin.edelstein@arkusinc.com.
To view the audit trail for previous revocation, [click here](#)

Accessing The Permissioner from the Mobile Device

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 Classic.

To Assign Permissions from your Mobile Device

- Open the Menu on Salesforce Mobile and Select Mobile Permissioner
- Make sure you are in the Assign tab at the top of your screen
- Search for the permission you would like to Assign
- Select the checkbox next to the permissions
- Search for the User you would like to Assign the permissions to
- Select the checkbox next to the User you would like to assign the permission to
- Click Assign
- 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

Known Limitations

The Permissioner can handle 1,000 Permission Set Assignments. An assignment is the 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.

Chatter Internal User
Create and Own New Chatter Groups
Edit HTML Templates
Export Reports
Invite Customers To Chatter
Manage Billing
Manage Letterheads
Manage Package Licenses

Manage Public List Views
Manage Public Reports
Manage Public Templates
Mass Email
Moderate Chatter
Send Email
View Encrypted Data

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.