

# The Permissioner - Installation 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.

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|----------------------------------------------------------|----------|
| <b>The Permissioner - Installation Guide for Classic</b> | <b>1</b> |
| Overview                                                 | 1        |
| Technical Requirements                                   | 1        |
| Support                                                  | 1        |
| Installation Steps                                       | 2        |
| Grant Access to Non-Admin Users                          | 5        |
| Mobile Setup                                             | 7        |
| Provide Arkus Feedback                                   | 7        |

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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. 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](mailto:support@arkusinc.com) or call (888) 271-1963 and leave a message with any questions or issues.

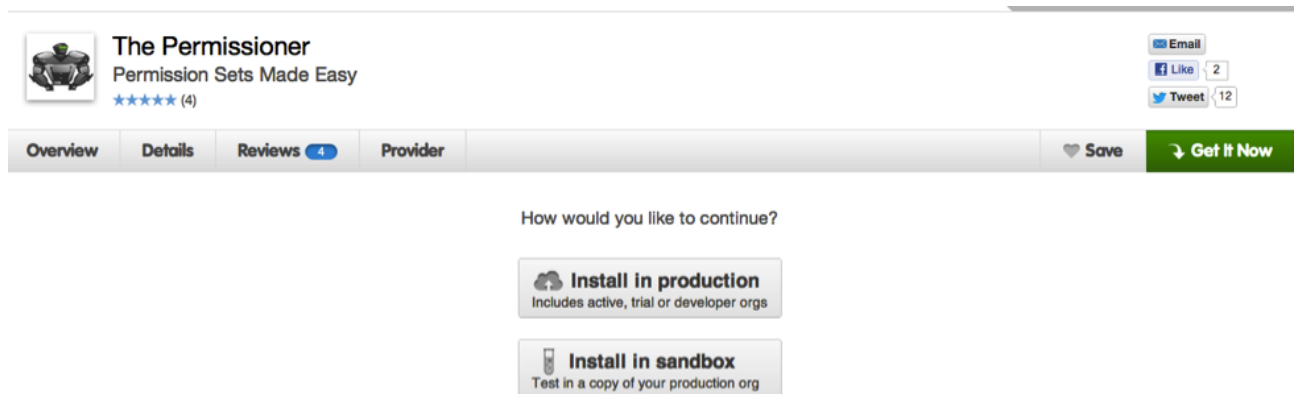
## Installation Steps

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

1. Navigate to the link below in your browser and click **Get It Now**.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000008XYMIEAO>

2. You are prompted to see if you have a Salesforce account, are a system administrator, and in which environment you want to install The Permissioner. We recommend that you install The Permissioner to your Sandbox environment to test and evaluate the application before installing the package in your production environment. Click **Continue**.



3. Confirm that you have read the Terms & Conditions, and click **Install**. You will be prompted to verify your password before the The Permissioner package begins the installation process.

4. The Package Installation Details page provides you with a detailed list of all components included in the The Permissioner package. Click **Continue**.



## Package Installation Details

[Help for this Page](#)

|                |              |
|----------------|--------------|
| Package Name   | Permissioner |
| Version Name   | Summer '12   |
| Version Number | 1.2 (Beta 6) |
| Publisher      | Arkus, Inc   |
| Description    |              |

[Continue](#) [Cancel](#)

### Package Components

► Tabs (1)

► Permission Sets (1)

► Code (3)

► Pages (1)

► Apps (1)

► Resources (3)

### Remote Access

No records to display

5. Review the object permissions in Step 1 of the installation and click **Next**.

Step 1. Approve Package API Access
Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

**Package Custom Objects**

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

**Extended Object Permissions**

|           | Read | Create | Edit | Delete |               | Read | Create | Edit | Delete |
|-----------|------|--------|------|--------|---------------|------|--------|------|--------|
| Accounts  | ✓    | ✓      | ✓    | ✓      | Leads         | ✓    | ✓      | ✓    | ✓      |
| Assets    | ✓    | ✓      | ✓    | ✓      | Opportunities | ✓    | ✓      | ✓    | ✓      |
| Campaigns | ✓    | ✓      | ✓    | ✓      | Price Books   | ✓    | ✓      | ✓    | ✓      |
| Cases     | ✓    | ✓      | ✓    | ✓      | Products      | ✓    | ✓      | ✓    | ✓      |
| Contacts  | ✓    | ✓      | ✓    | ✓      | Push Topics   | ✓    | ✓      | ✓    | ✓      |
| Contracts | ✓    | ✓      | ✓    | ✓      | Social Posts  | ✓    | ✓      | ✓    | ✓      |
| Documents | ✓    | ✓      | ✓    | ✓      | Solutions     | ✓    | ✓      | ✓    | ✓      |
| Ideas     | ✓    | ✓      | ✓    | ✓      |               |      |        |      |        |

**General User Permissions**

This Package will be able to use all of the General User Permissions from the user's Profile.

**Administrative Permissions**

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next
Cancel

6. Choose the security level in Step 2 of the installation. We recommend that you **Grant access to admins only**, as The Permissioner will likely be used by system administrators. In the event that your org has different policies, **Select security settings** will allow you to provide access for your specific needs. Click **Next**.

Step 2. Choose security level
Step 2 of 3

Select security settings:

☒ Grant access to admins only
Users with your profile get full access (best for limited deployments)

☐ Grant access to all users
All internal custom profiles get full access

☐ Select security settings
User access set by profile (recommended for most packages)

Previous
Next
Cancel

7. Click **Install** to start installing the package into your Salesforce environment.

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click Install to continue.

[Previous](#)
[Install](#)
[Cancel](#)

8. After the installation occurs, you will see the Install Complete page notifying you that the package was installed correctly.

Package Details
[Help for this Page](#) ?

### Permissioner (Managed)

[« Back to List: Installed Package](#)

**Install Complete**

Follow any remaining steps in the app install guide to complete deployment.

Installed Package Detail

[Uninstall](#)
[View Components](#)
[View Dependencies](#)

|                  |                                                                                                                                             |                |                                                    |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------|----------------------------------------------------|
| Package Name     | Permissioner                                                                                                                                | Version Number | 1.2 (Beta 6)                                       |
| Language         | English                                                                                                                                     | Package Type   | Managed                                            |
| Version Name     | Summer '12                                                                                                                                  | API Access     | Unrestricted <a href="#">[Enable Restrictions]</a> |
| Namespace Prefix | permissioner                                                                                                                                | Modified By    | <a href="#">Staci Rice</a> , 9/15/2012 9:04 AM     |
| Publisher        | Arkus, Inc                                                                                                                                  |                |                                                    |
| Description      | The Permissioner is an application that allows administrators to assign permission sets to users in mass via an intuitive Visualforce page. |                |                                                    |
| Installed By     | <a href="#">Staci Rice</a> , 9/15/2012 9:04 AM                                                                                              |                |                                                    |

## 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 Visualforce pages. 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
V

### The Permissioner - Permission Set

[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 | <input type="checkbox"/>                                                             | Created By       | <a href="#">Justin Edelstein</a> , 9/16/2012 3:14 PM |
| Last Modified By            | <a href="#">Justin Edelstein</a> , 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](#)

[Help for this Page](#)

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**

| Action                                                                | Full Name ↑    | Alias | Username      | Last Login        | Role      | Active | Profile | Manager |
|-----------------------------------------------------------------------|----------------|-------|---------------|-------------------|-----------|--------|---------|---------|
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a> | 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](#)

[Help for this Page](#)

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**

| Action                                                                           | Full Name ↑    | Alias | Username      | Last Login        | Profile | Role |
|----------------------------------------------------------------------------------|----------------|-------|---------------|-------------------|---------|------|
| <input checked="" type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a> | Adams, Linda   | ladam | linda.adams   | 4/29/2020 8:54 AM |         |      |
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>            | Buciferro, Amy | abucc | amy.buciferro | 4/29/2020 1:01 PM |         |      |
| <input checked="" type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a> | Bujold, James  | jbujo | james.bujold  | 4/29/2020 5:34 PM |         |      |

[Assign](#) [Cancel](#)

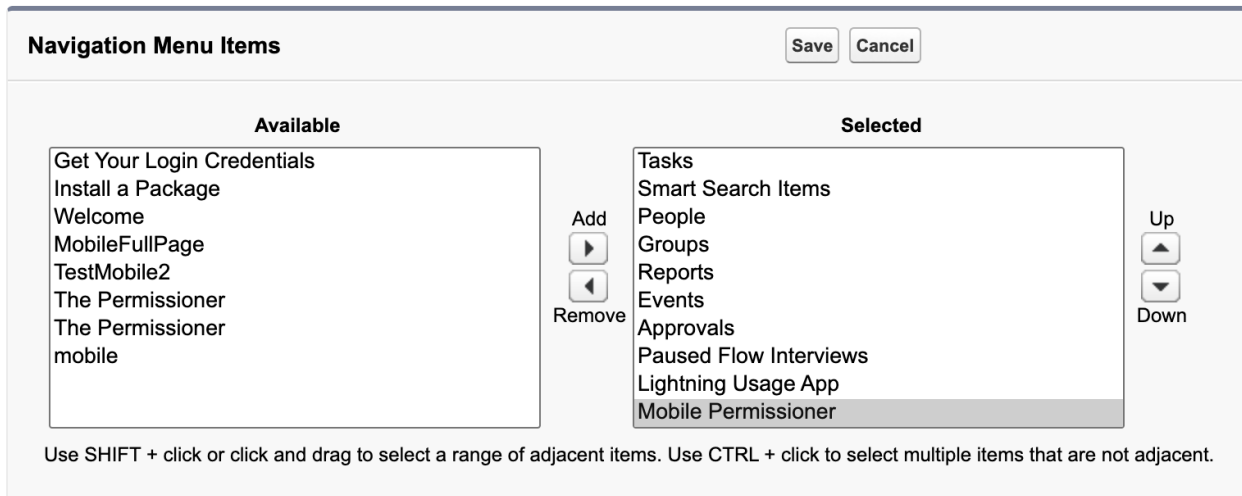
5. Once you are done selecting the users, click the “Assign” button.

6. Click Done.

## Mobile Setup

The Permissioner can also be accessed on Salesforce Mobile. Follow these instructions to set it up.

1. In the Setup area, under Administer, click Mobile Administration and select Mobile Navigation.
2. Under Available Navigation Menu Items, select Mobile Permissioner and add the Mobile Permissioner item to the list of selected Navigation Menu Items and **Save**



**Navigation Menu Items** Save Cancel

| Available                  |             | Selected               |
|----------------------------|-------------|------------------------|
| Get Your Login Credentials | Add<br>▶    | Tasks                  |
| Install a Package          |             | Smart Search Items     |
| Welcome                    | Remove<br>◀ | People                 |
| MobileFullPage             |             | Groups                 |
| TestMobile2                |             | Reports                |
| The Permissioner           |             | Events                 |
| The Permissioner mobile    |             | Approvals              |
|                            |             | Paused Flow Interviews |
|                            |             | Lightning Usage App    |
|                            |             | Mobile Permissioner    |

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

## Provide Arkus Feedback

If you need additional support or have an issue to share with us, please reach out to [support@arkusinc.com](mailto: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](http://www.arkusinc.com) or contact us at [www2.arkusinc.com/contact](http://www2.arkusinc.com/contact).

You can learn more about our other free app, Clone This User, at [www.clonethisuser.com](http://www.clonethisuser.com).