

Profile and Permission Set Management

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Profiles

Profiles control what Users can see and do:

- Apex Class Access
- Apex Page Access
- Application Visibility + Default
- External Data Sources
- Field Permissions
- Layout Assignments
- Object Permissions
- Record Type Visibility + Default
- Tab Visibility
- User Permissions
- Custom Permissions



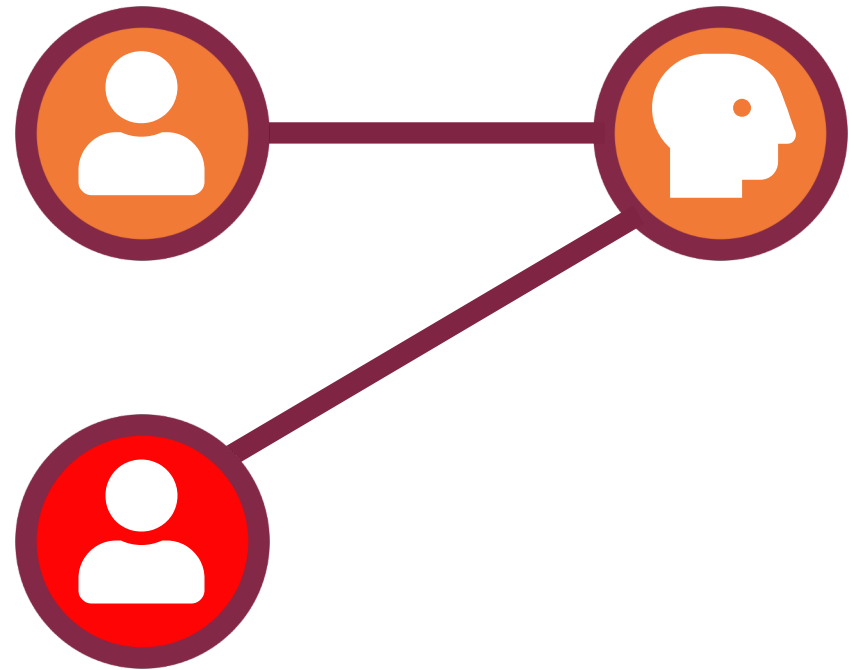
What's Wrong With Them?

- Too Many Permissions Bundled Together
- Very Limited User Assignment Options
- Generate Huge Metadata Documents
- Governance Based On User Complaints
- Profiles Lack Top-Down Security Design
- Too Many Profiles Because of Exceptions



Profiles

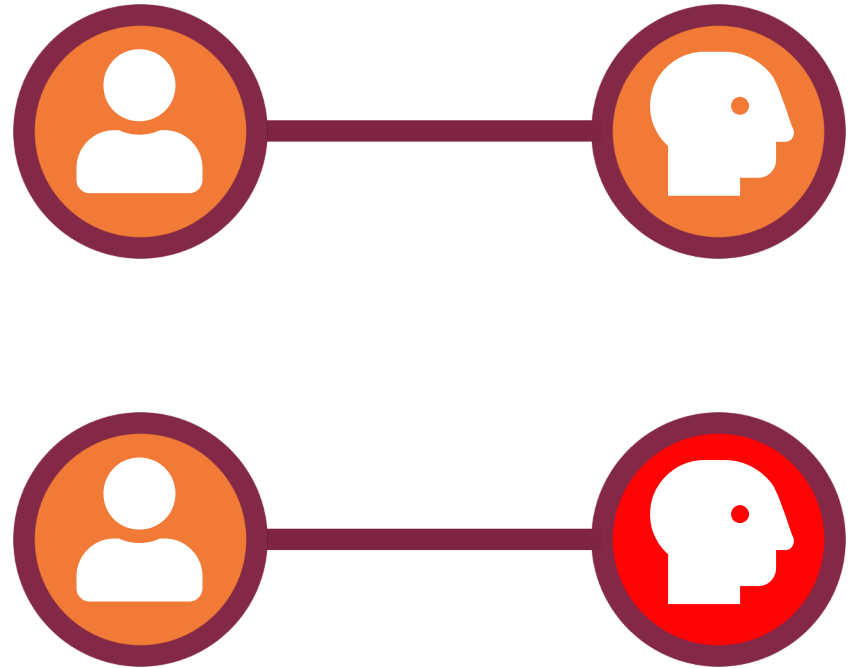
When a User needs a new permission





Profiles

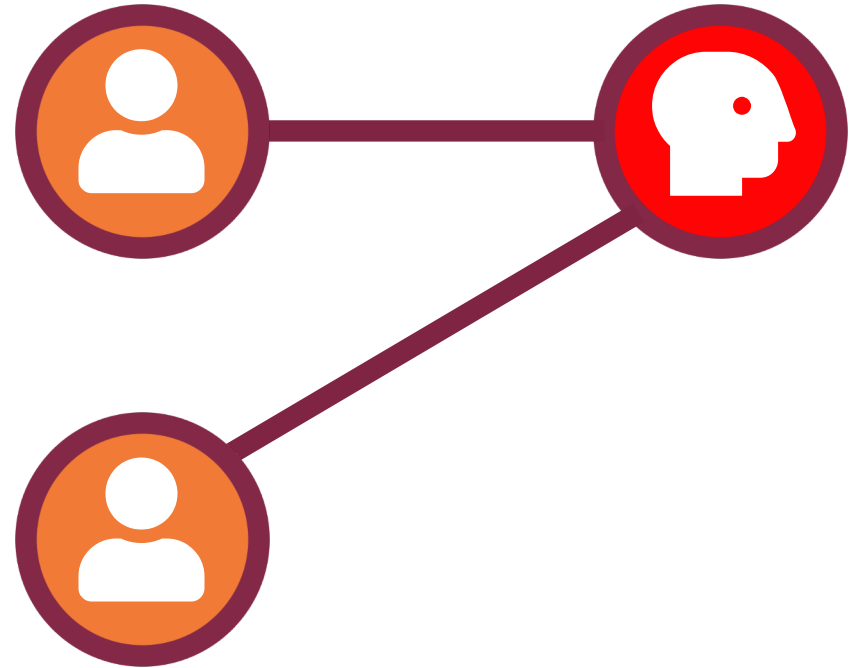
There is a tendency to duplicate Profiles





Profiles

Or just add new permissions to a Profile





Permission Sets

Like Sparse Mini Profiles:

- Apex Class Access
- Apex Page Access
- Application Visibility
- External Data Sources
- Field Permissions
- Object Permissions
- Record Type Visibility
- Tab Visibility
- User Permissions
- Custom Permissions

But They Don't Have:

- Default Application
- Layout Assignments
- Default Record Type
- Login Hours



Profiles

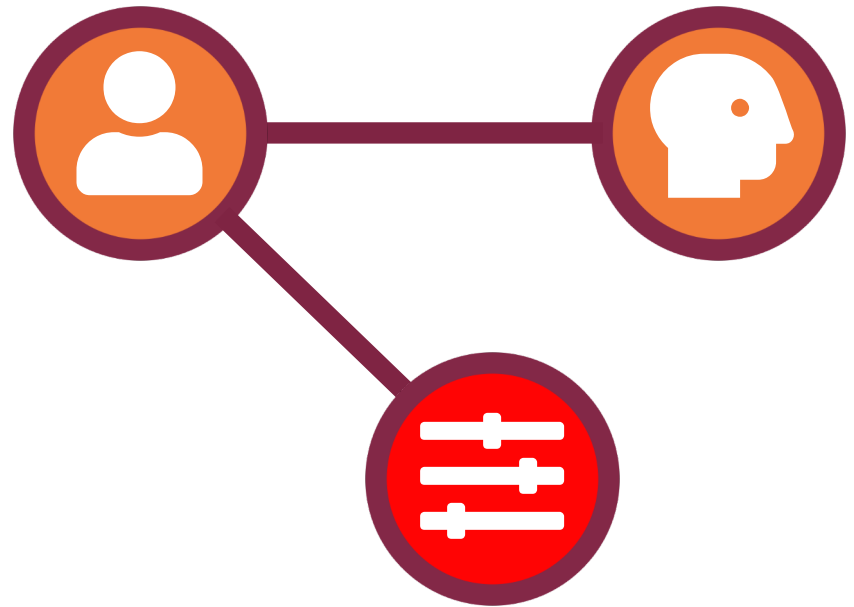
Every User has a base Profile





Permission Sets

Permission Sets only grant Privileges





What's Wrong With Them?

- Mainly Good For Exceptions
- Not A General Replacement for Profiles
- Can Require Lots of User Assignments
- Salesforce Has A Solution! Version 48



Profiles

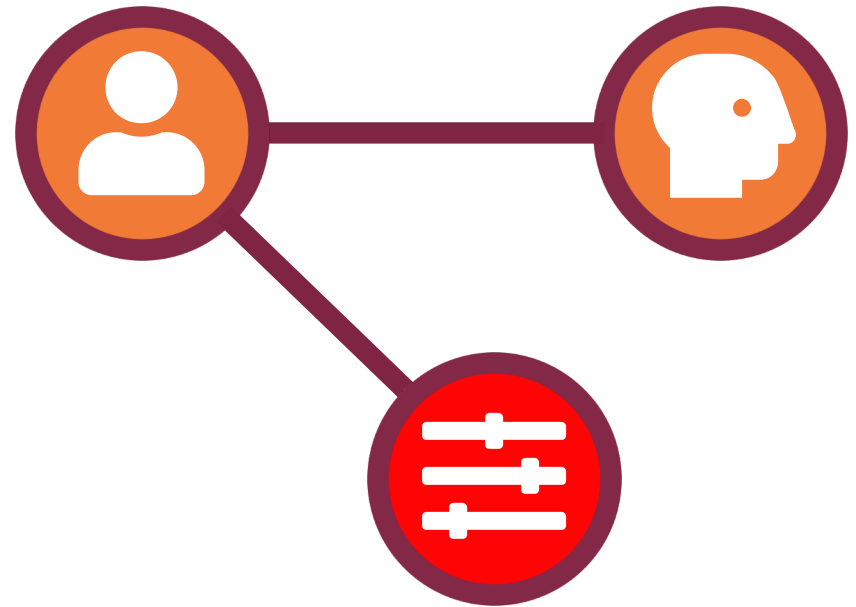
Every User has a base Profile





Permission Sets

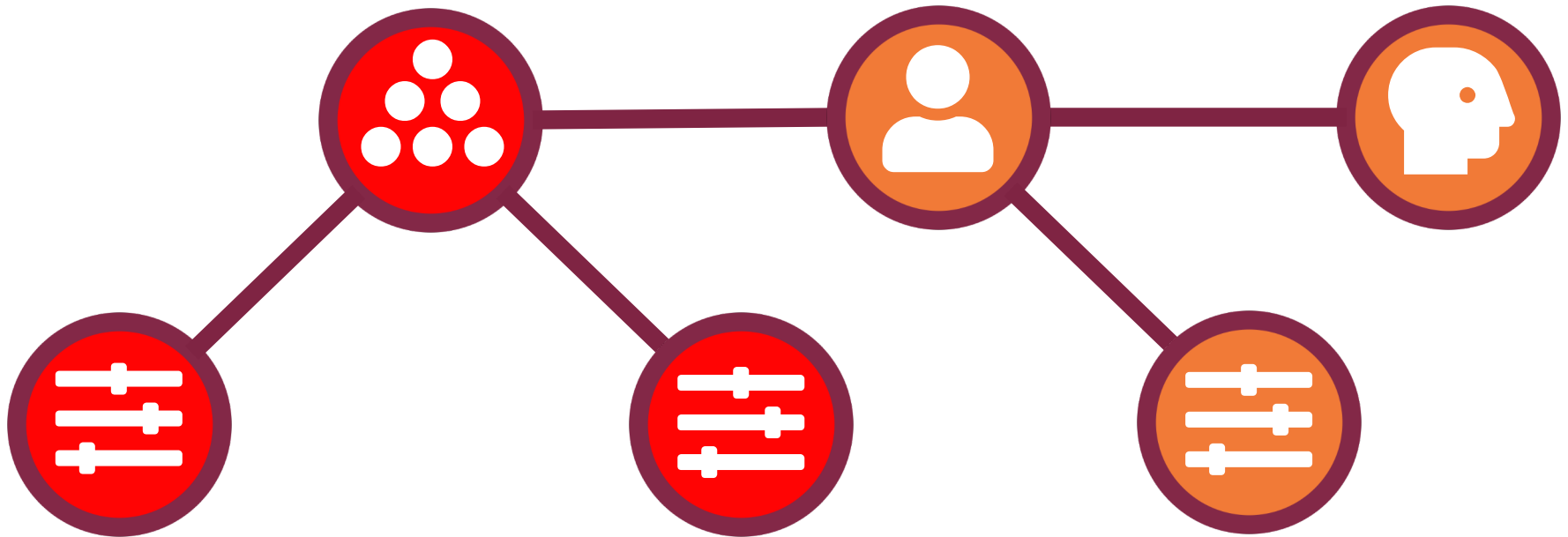
Permission Sets only grant privileges





Permission Set Groups

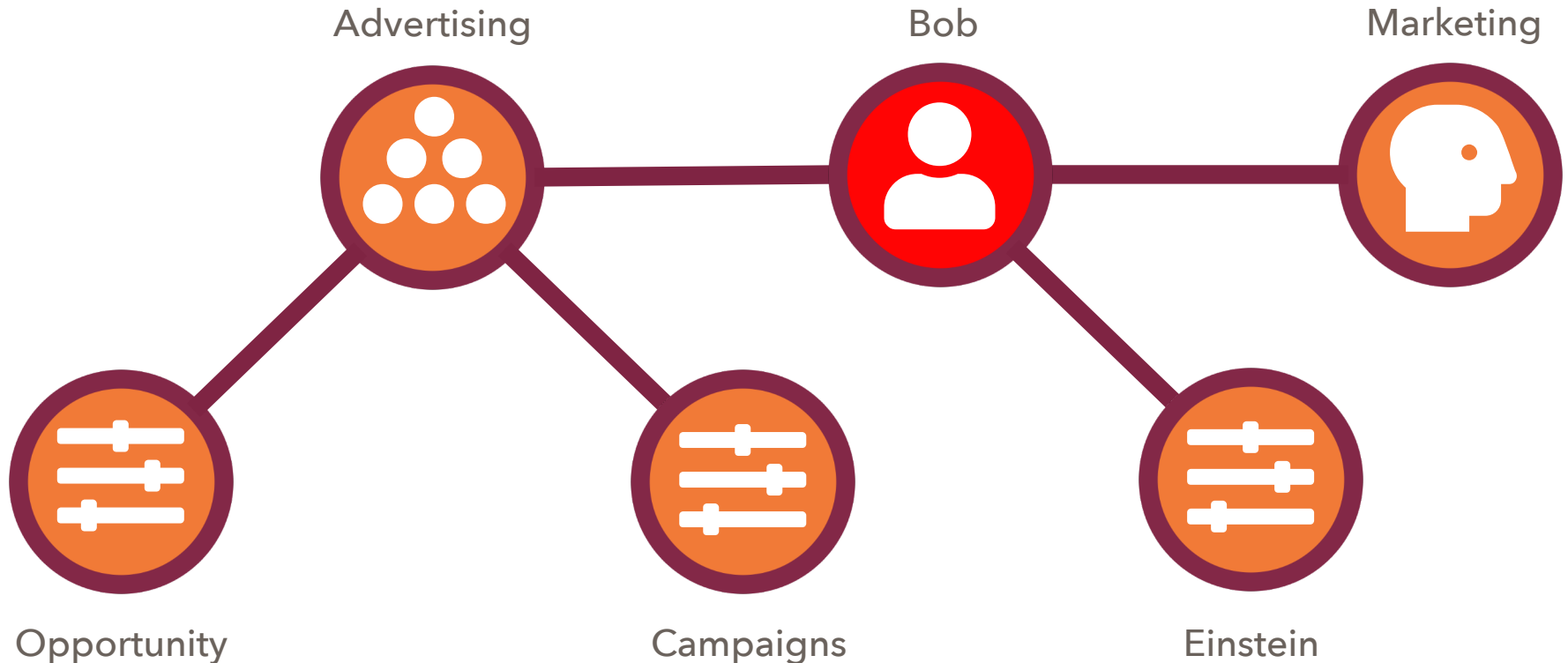
Permission Set Groups organize Permission Sets





Meaningful Permissions

Organize for clarity, context, and meaning





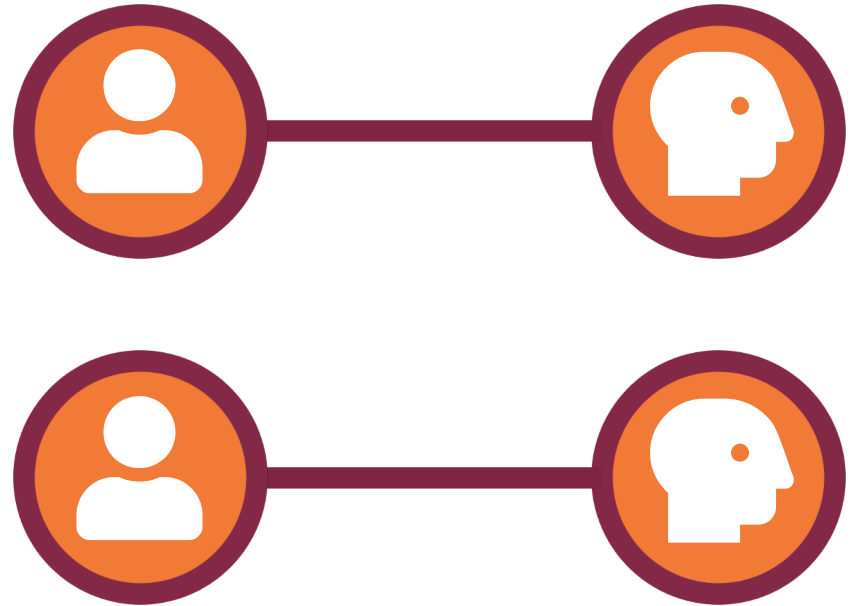
How Do We Get There?

- Start Over From Scratch
- Adopt Salesforce Nomenclature
- Adopt Corporate Nomenclature
- Move Permissions Out Of Profiles
- Gradual Transition To Groups



Merge Similar Profiles

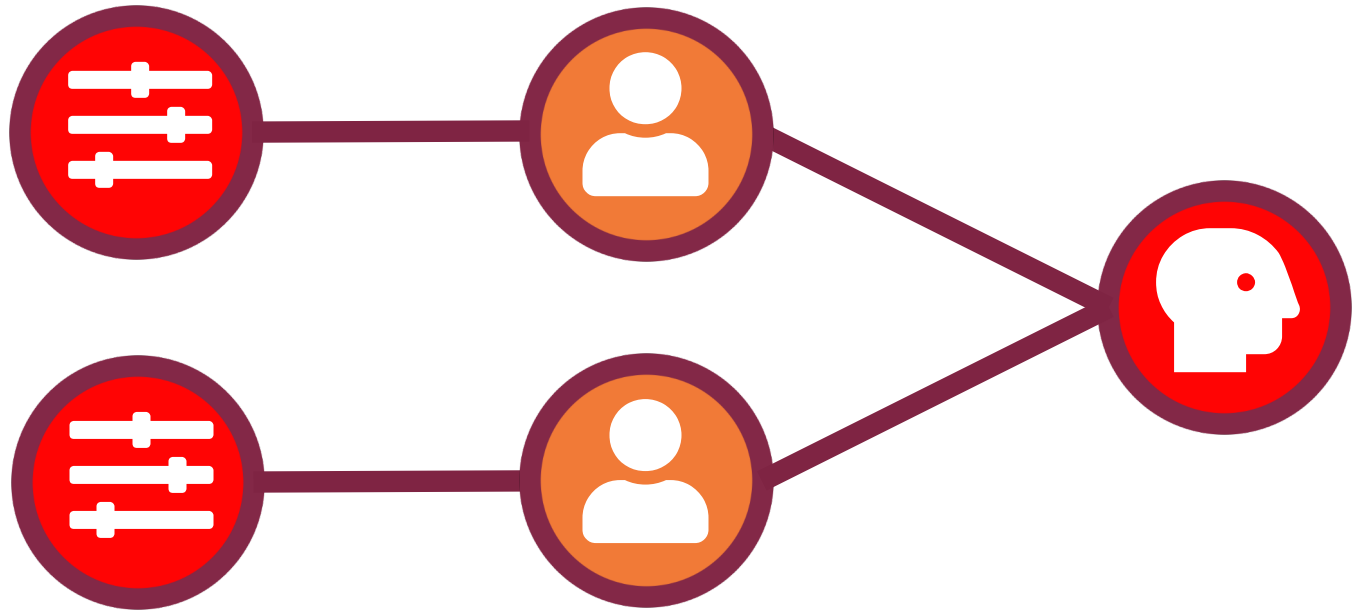
Orgs tend to have many similar Profiles





Merge Similar Profiles

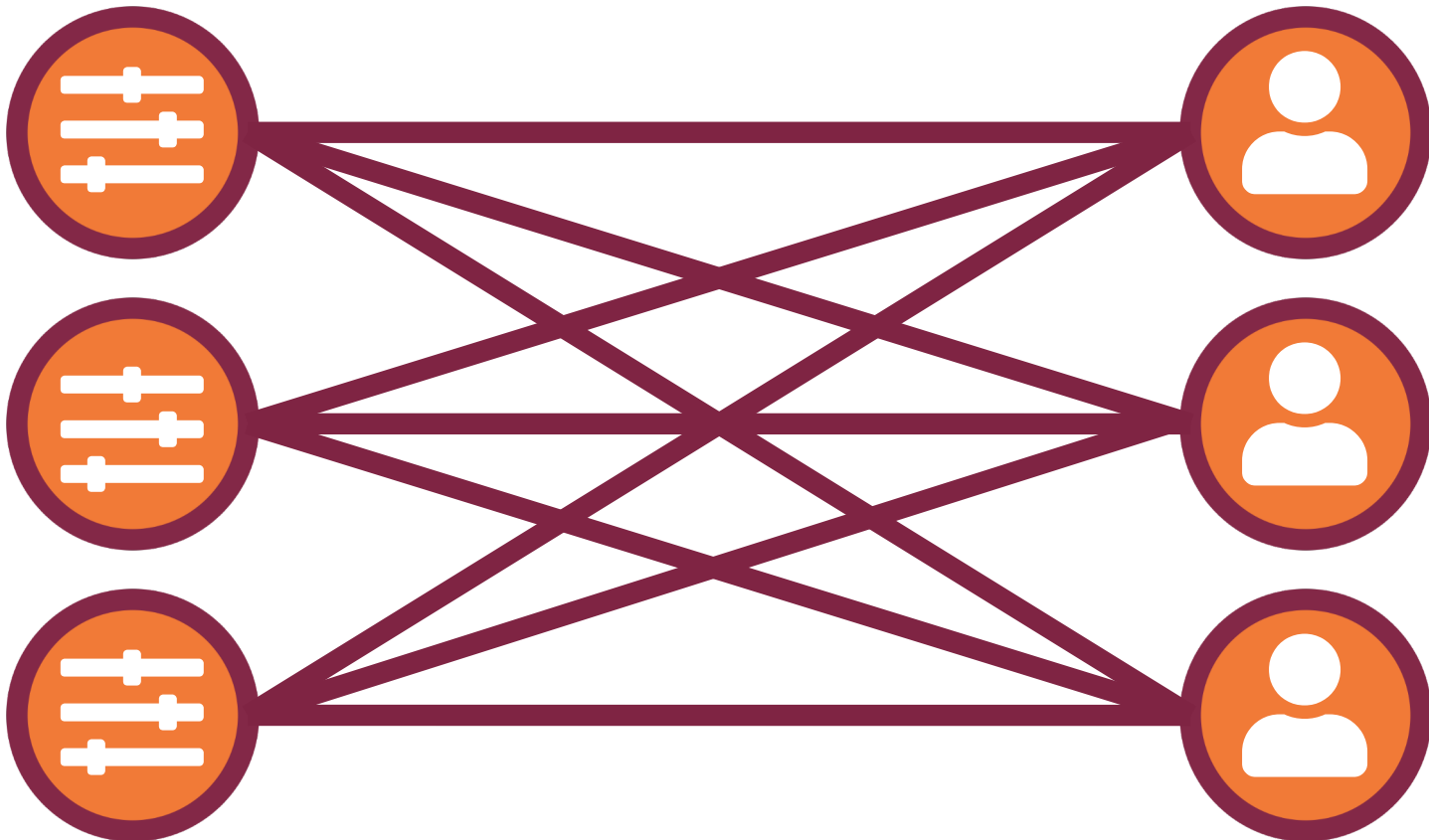
Merge Profiles and fill the gap with Permission Sets





Permission Set Factoring

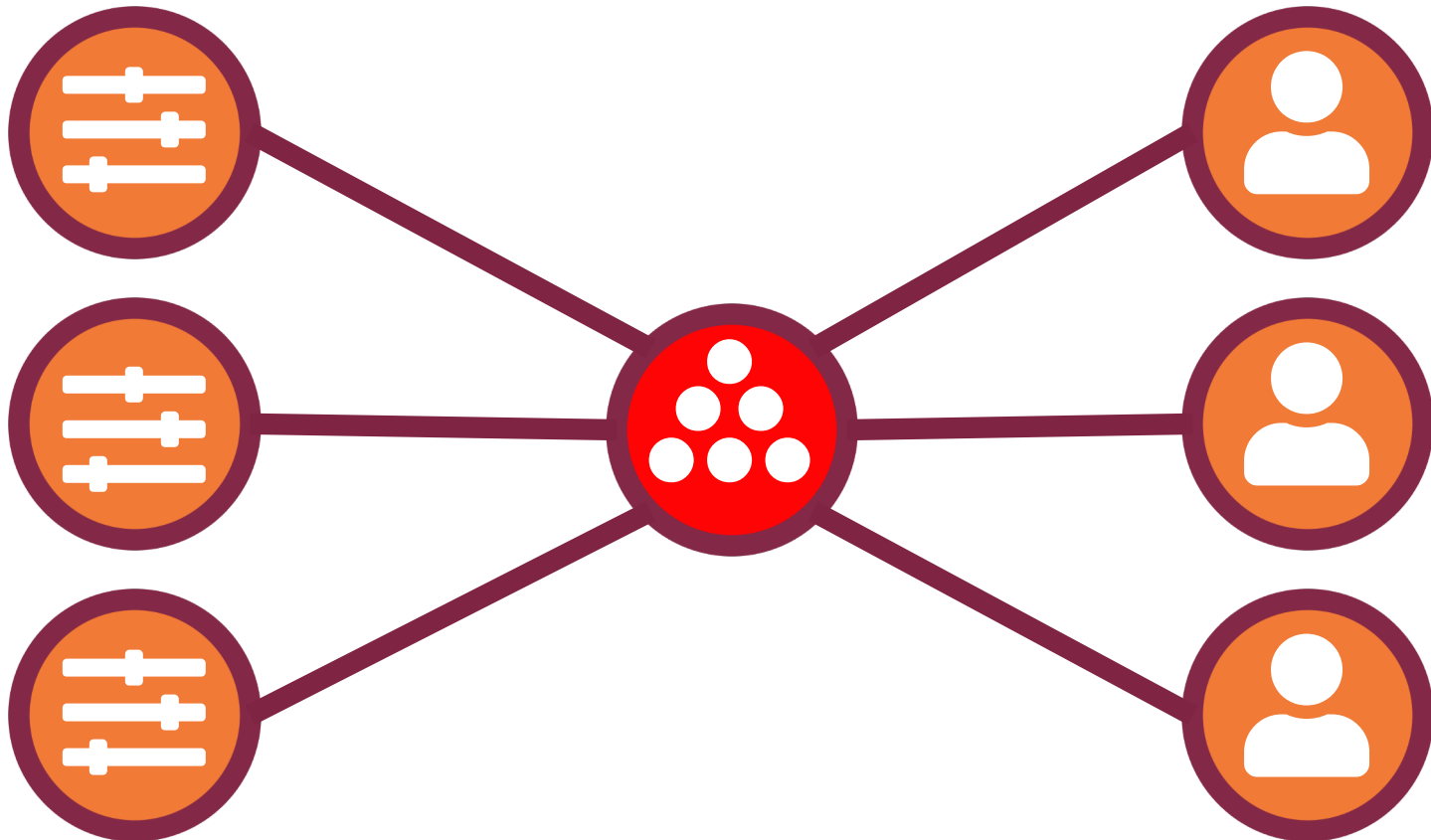
Permission Set Assignments can become complex





Permission Set Factoring

Permission Set Groups simplify Assignments





Permission Reporting

Combine Profile + assigned Permission Sets

Profiles And Permission Sets For Snap_20 (Username: newss@df.com)

Select Profiles and Permission Sets Display Report Schedule Report

Check the boxes below to include a profile or permission set:

- ☐ Tab Visibility
- ☐ User Permissions
- ☐ Custom Permissions
- ▼ Combined Security
 - ☐ Apex Class Accesses
 - ☐ Apex Page Accesses
 - ☐ Application Visibility
 - ☐ External Data Sources
 - ☐ Field Permissions
 - ☒ Object Permissions
 - ☐ Record Type Visibility
 - ☐ Tab Visibility
 - ☐ User Permissions
 - ☐ Custom Permissions
 - ☐ User Preferences

This table shows a preview of the selected profile or permission set.

Object Permissions	Account	Account_Custom
billnewss@mz.com (Bill Appleton)	Custom: StandardUser2 (No Access) Set_User_Perm (Read) Account_Object_Manipulation (Create, Read) Combined Security (Create, Read)	Custom: StandardUser2 (No Access) Combined Security (Create, Read)
joshdev@metazoa.com (Josh Hyde)	Force.com - Free User (No Access) Combined Security (No Access)	Force.com - Free User (No Access) Combined Security (No Access)
newss@df.com (Bill Barnes)	Admin (Full Access) Account_RW (Full Access) Combined Security (Full Access)	Admin (No Access) Combined Security (Full Access)

OK Next



Permission Bulk Editing

View Assets For Snap_20 (Username: newss@df.com)

View Assets View Profiles View Permission Sets

Editing Palette Trim Table state, Read, Edit, Delete, Modify, and View Object Permissions

Object Permissions	A_DX_Object_c	Account	Account_Custom_Settings_c	Account_F
Admin	Full Access	Full Access	No Access	F
Admin - Non SSO	Full Access	Full Access	No Access	F
Chatter External User	No Access	No Access	No Access	
Chatter Free User	No Access	No Access	No Access	
Chatter Moderator User	No Access	No Access	No Access	
ContractManager	No Access	Create, Delete, Edit, Read		
Cross Org Data Proxy User	No Access	Read		
Custom: Chatter External	No Access	No Access		
Custom: Contract Manager	No Access	Create, Delete, Edit, Read		
Custom: Contract Manager2	No Access	Create, Delete, Edit, Read		
Custom: Contract Manager3	No Access	Create, Delete, Edit, Read		
Custom: Contract Manager4	No Access	Create, Delete, Edit, Read		
Custom: Contract Manager5	No Access	Create, Delete, Edit, Read		
Custom: Cross Org Data Proxy User	No Access	Read	No Access	

Profile Editing Palette

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

Force Apply

Cancel OK Next



Permission Comparison

Compare Assets For Push_15 (person1@metazoa.com to ss@df.com)

Compare All Assets | Compare Profiles | Compare Permission Sets

Side By Side | **Single Table** | Trim Table | ☐ Hide Rows | ☐ Hide Columns | Object Permissions ▼

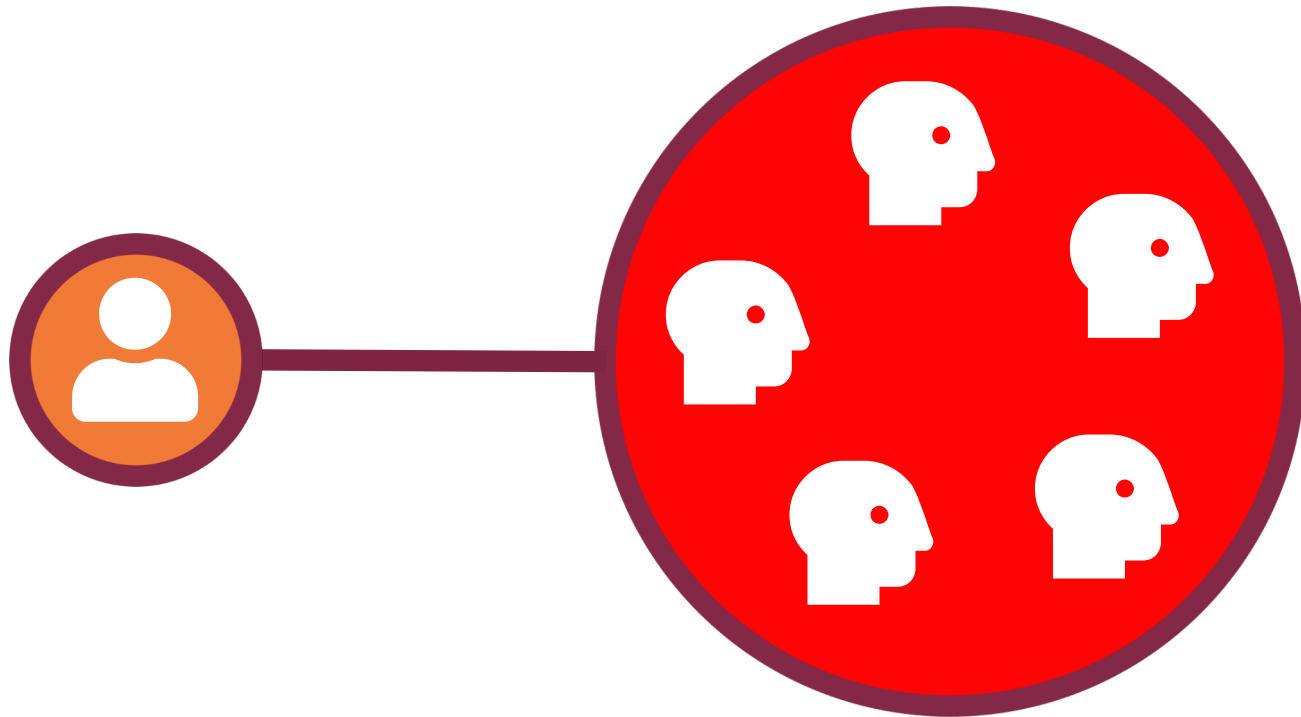
Source Object Permissions	Destination Object Permissions	Source A_DX_Object__c	Destination A_DX_Object__c
	A & B		No Access
Admin	Admin	Full Access	Full Access
Chatter External User	Chatter External User	No Access	No Access
Chatter Free User	Chatter Free User	No Access	No Access
Chatter Moderator User	Chatter Moderator User	No Access	No Access
Clone_Admin		Full Access	
ContractManager	ContractManager	No Access	No Access
	Cross Org Data Proxy User		No Access
Custom Profile		Read, View	
	Custom: Contract Manager2		No Access
	Custom: Marketing Profile		No Access
	Custom: Profile Filler		No Access
	Custom: Sales Profile		No Access
	Custom: Standard Platform User		No Access

Cancel OK Next



Old Model: Profiles

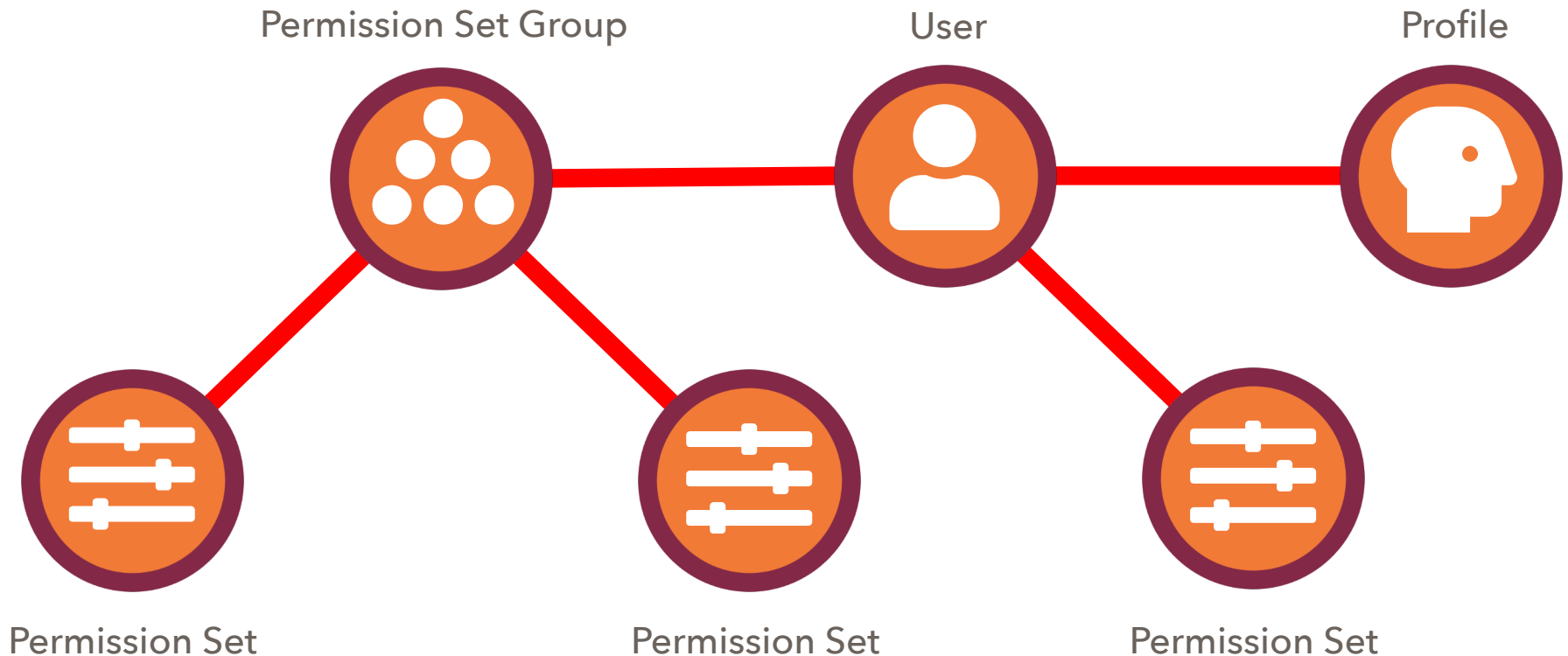
Complex Profiles determine permissions





New Model: Assignments

User assignments determine permissions





Permission Assignments

User Permission Assignments For Snap_22 (Username: person1@metazoa.com)

Assign Permissions | Create Groups | Select Reports | Display Report | Schedule Report

Select Users | Select a User at left to see the assigned Profile, Permission Sets, and Permissions | Save Assignments

Users | Profiles | **Permission Set Groups** | **Permission Sets**

Quick Find Users

person1@metazoa.com (Tim Ba)
person2@metazoa.com (Bob Sn)
person3@metazoa.com (Karen L)
person4@metazoa.com (Suzy Jo)
person5@metazoa.com (Bill And)

Quick Find Profiles

Admin	*
Chatter External User	*
Chatter Free User	*
Chatter Moderator User	*
Clone_Admin	*
ContractManager	*
Custom Profile	*
Guest	*
Marketing Custom	*
MarketingProfile	*
ReadOnly	*
Restricted Read Only	*
SolutionManager	*
Special User	*
Special User Profile	*
Standard	*
testing Profile	*

Quick Find Permission Set Groups

<input type="checkbox"/> acme_name	*
<input type="checkbox"/> example	*
<input type="checkbox"/> first_group	*
<input checked="" type="checkbox"/> test555	*
<input checked="" type="checkbox"/> test66	*
<input type="checkbox"/> test_group	*
<input type="checkbox"/> whatever	*

Quick Find Permission Sets

<input type="checkbox"/> Account_RW	*
<input type="checkbox"/> Another	*
<input checked="" type="checkbox"/> bill_test	*
<input checked="" type="checkbox"/> sales_console	*
<input checked="" type="checkbox"/> test_me	*

OK | Next



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