The Ultimate Guide to User Management

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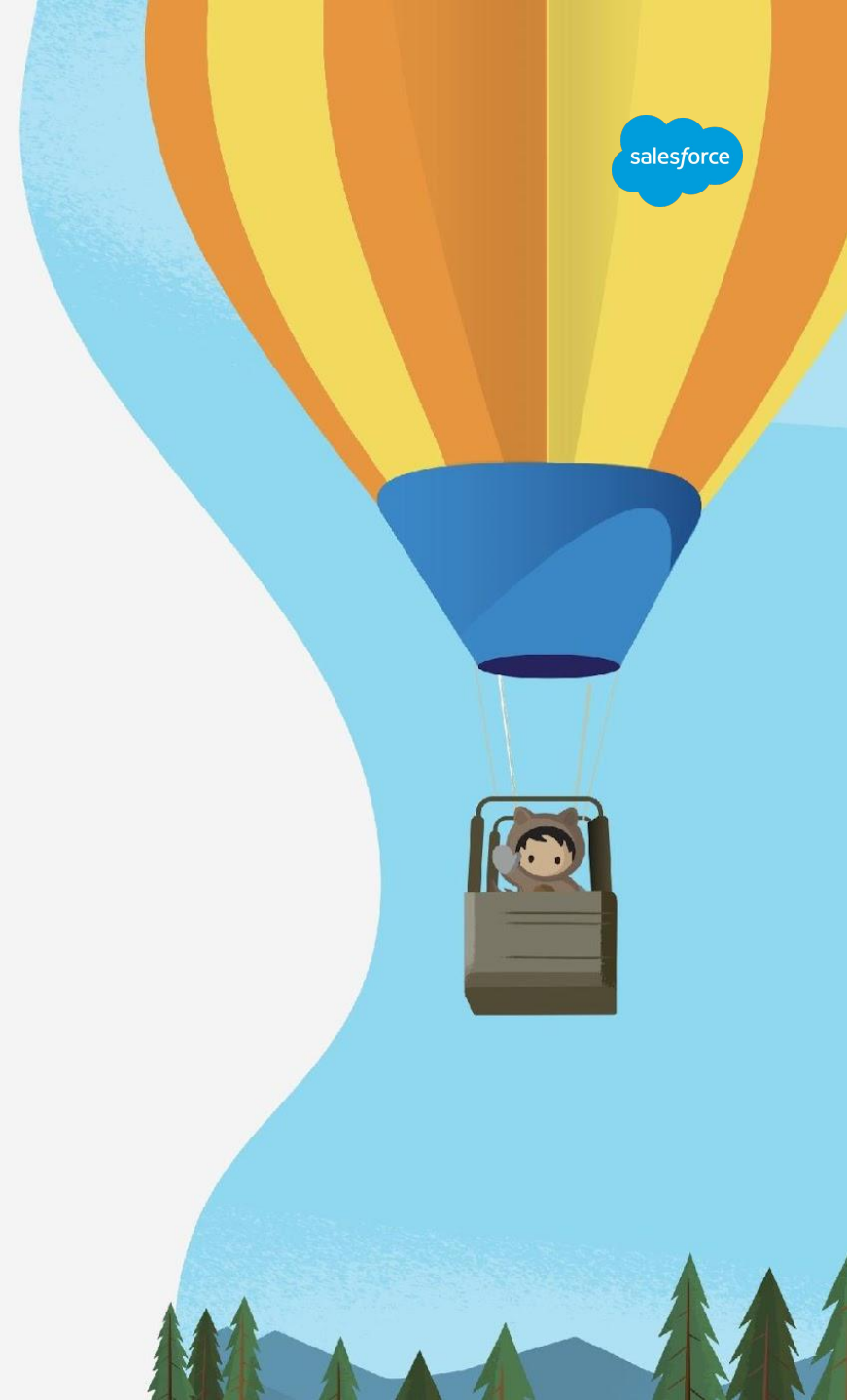
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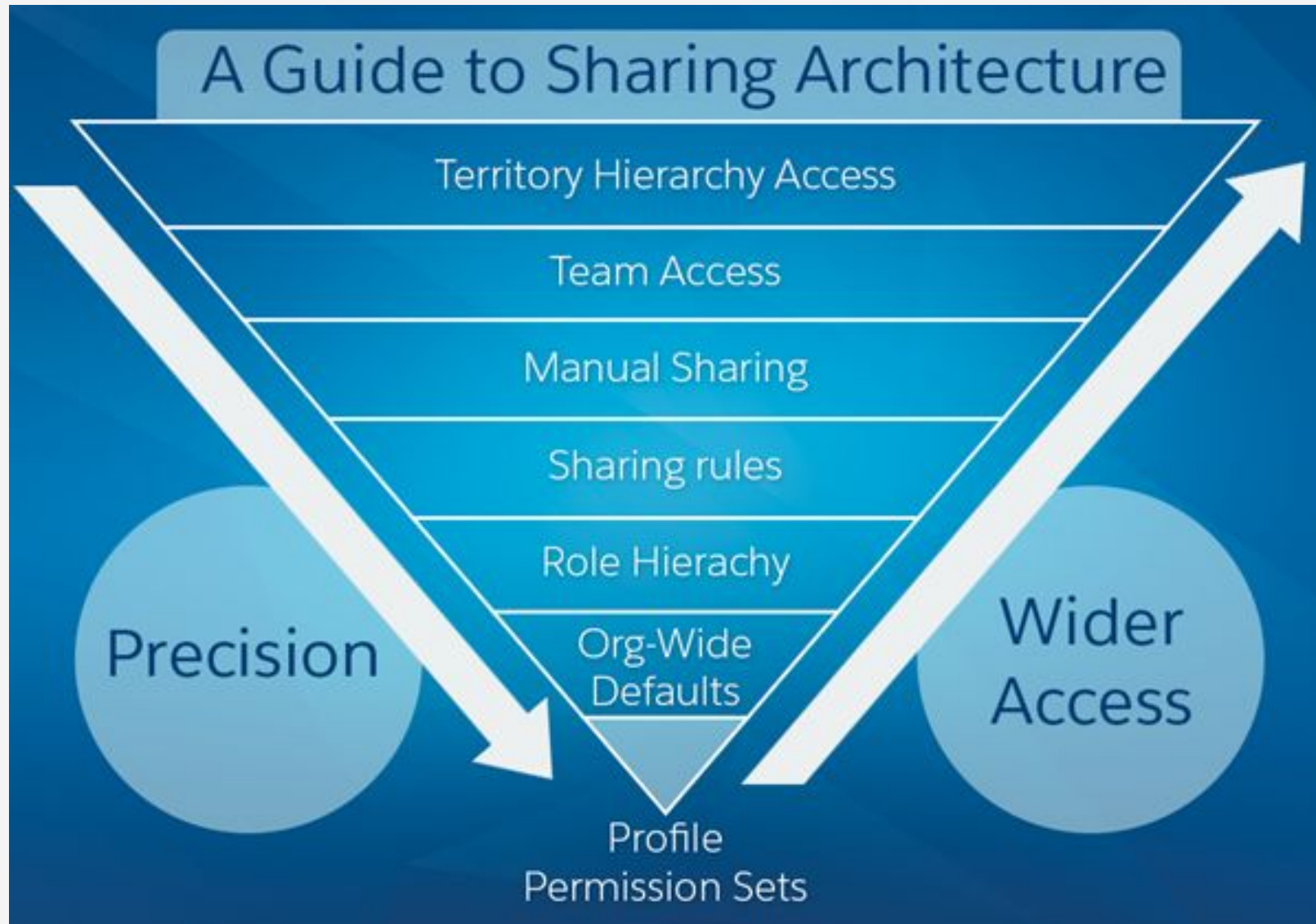
Agenda

Current State: User Management

Best Practice: Role Based Access Control

Next Generation: Permission Set Groups

Current State: User Management

A Guide to Sharing Architecture

Territory Hierachy Access
Team Access
Manual Sharing
Sharing rules
Role Hierachy
Org-Wide Defaults
Profile Permission Sets

Precision

Wider Access

Security + Sharing = Success

Org-Wide Defaults (OWD)
- Options: Private, Public Read, Public Read / Write, Public Read / Write / Transfer (Leads & Cases only)
- Out-of-the-box defaults are very liberal!
- Make them as restrictive as possible
- Community Best Practice: Private
- Don't configure for NOW, configure for the FUTURE
    - Easier to relax settings later than to take away access
- Consideration for mass imports: Record Owner can impact sharing
- Take Role Hierarchies into consideration
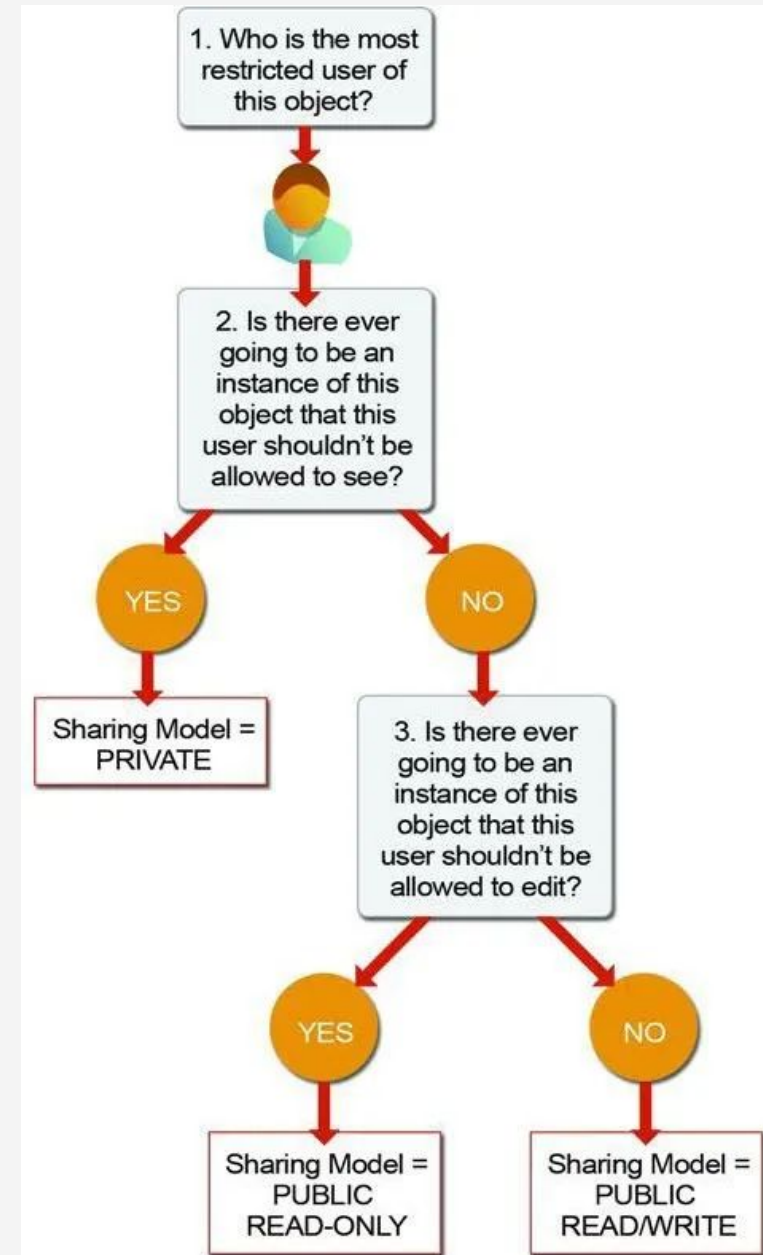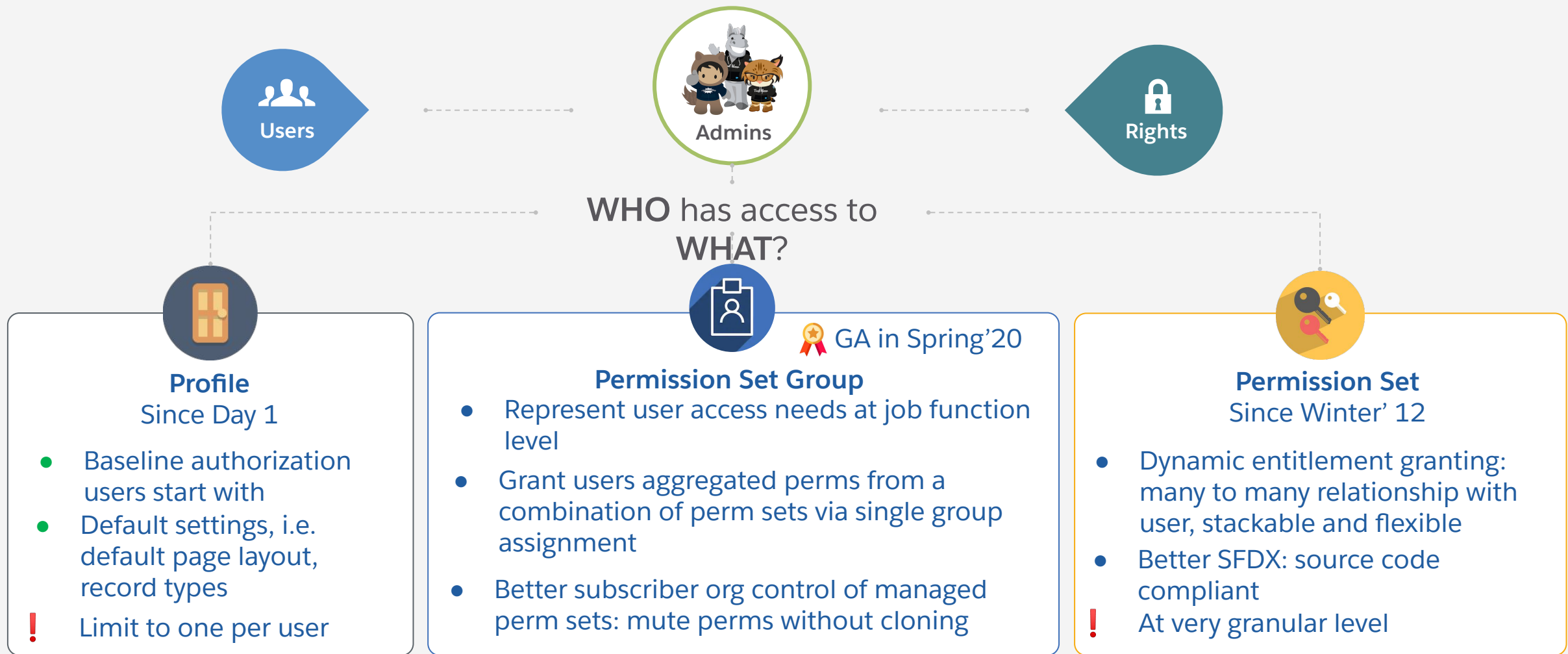
Sharing is Caring

Sharing Rules

- Exceptions to OWDs -> Can only open up settings; cannot restrict
- Opens up access to specific users or sets of users
- Rules can be based on Record Owner or criteria
- Make sure multiple rules don't override each other
- Consider 'Teams' for Accounts, Opportunities and Cases
- Community Best Practice: Pay attention to sharing rules that have "Shared with roles and subordinates"
  - May inadvertently expose records to community users

Manual Sharing:

- Give ability to users for one-off sharing of records they own

Division of Labor for User Access Security

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Users

Admins

Rights

WHO has access to WHAT?

🏅 GA in Spring'20

Profile
Since Day 1

- 🟢 Baseline authorization users start with
- 🟢 Default settings, i.e. default page layout, record types
- ❗ Limit to one per user

Permission Set Group

- Represent user access needs at job function level
- Grant users aggregated perms from a combination of perm sets via single group assignment
- Better subscriber org control of managed perm sets: mute perms without cloning

Permission Set
Since Winter' 12

- Dynamic entitlement granting: many to many relationship with user, stackable and flexible
- Better SFDX: source code compliant
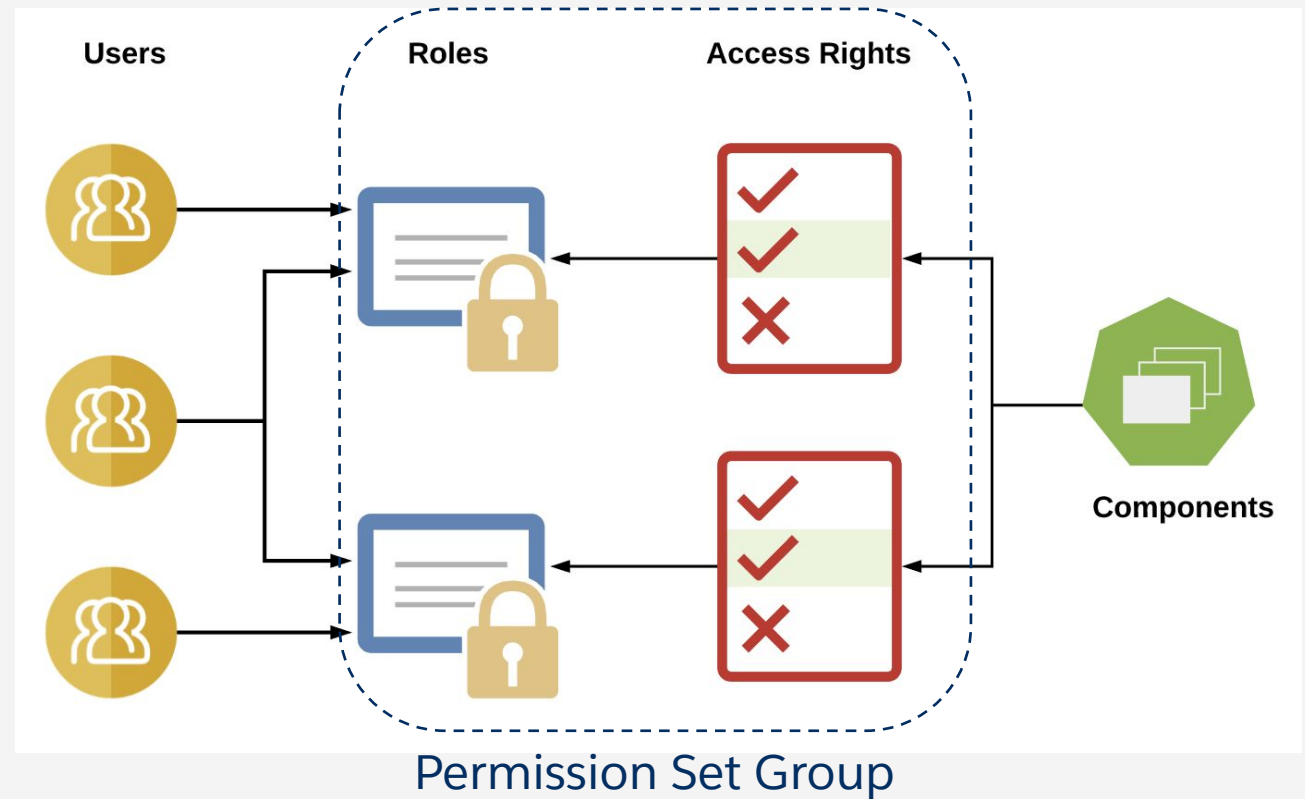- ❗ At very granular level

Best Practice: Role Based Access Control

Roles in the context **is not** referring to Salesforce Role Hierarchy

- Follows the principle that permissions are granted based on job roles of individual users.
- Allows users to access only the information they need to do their jobs.
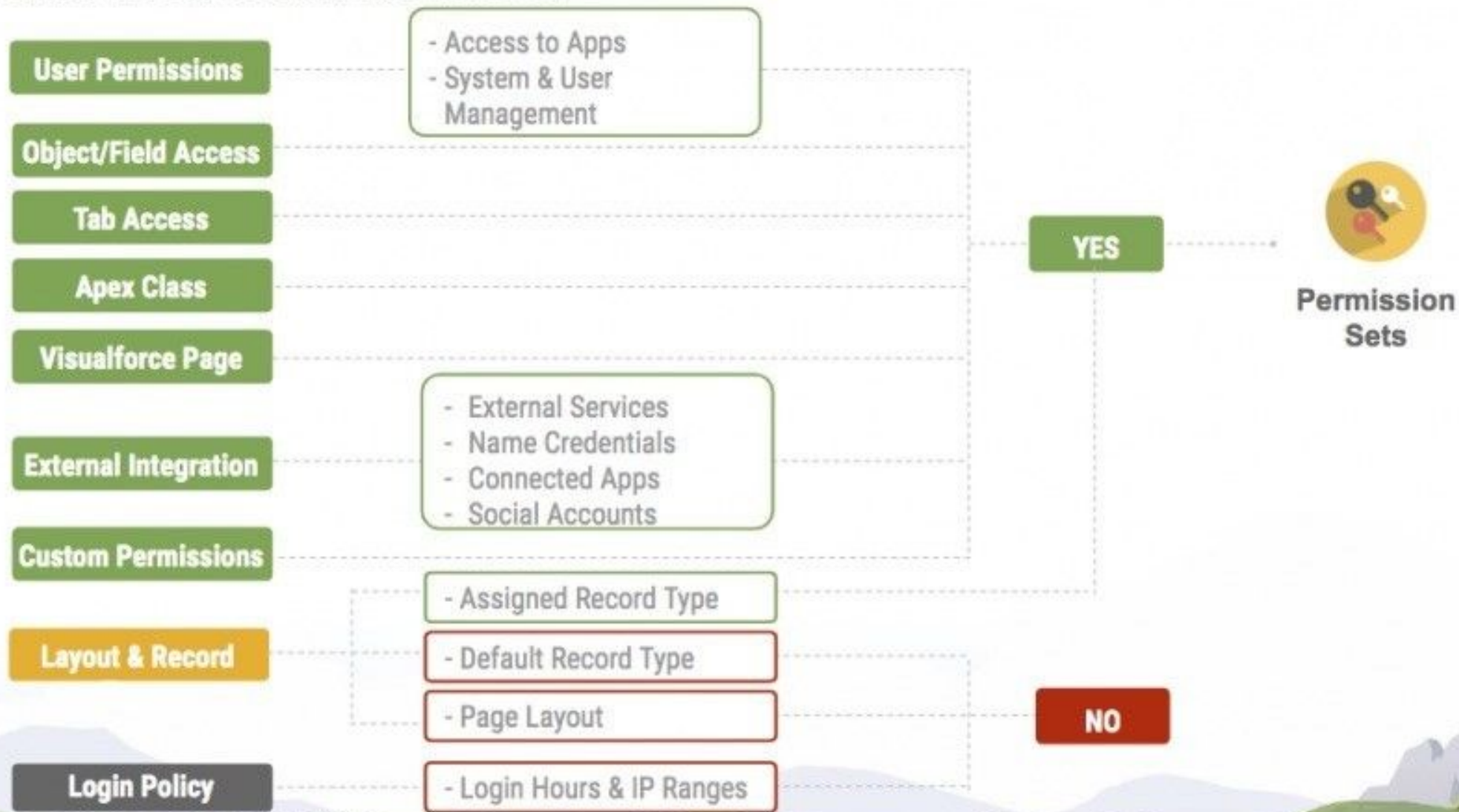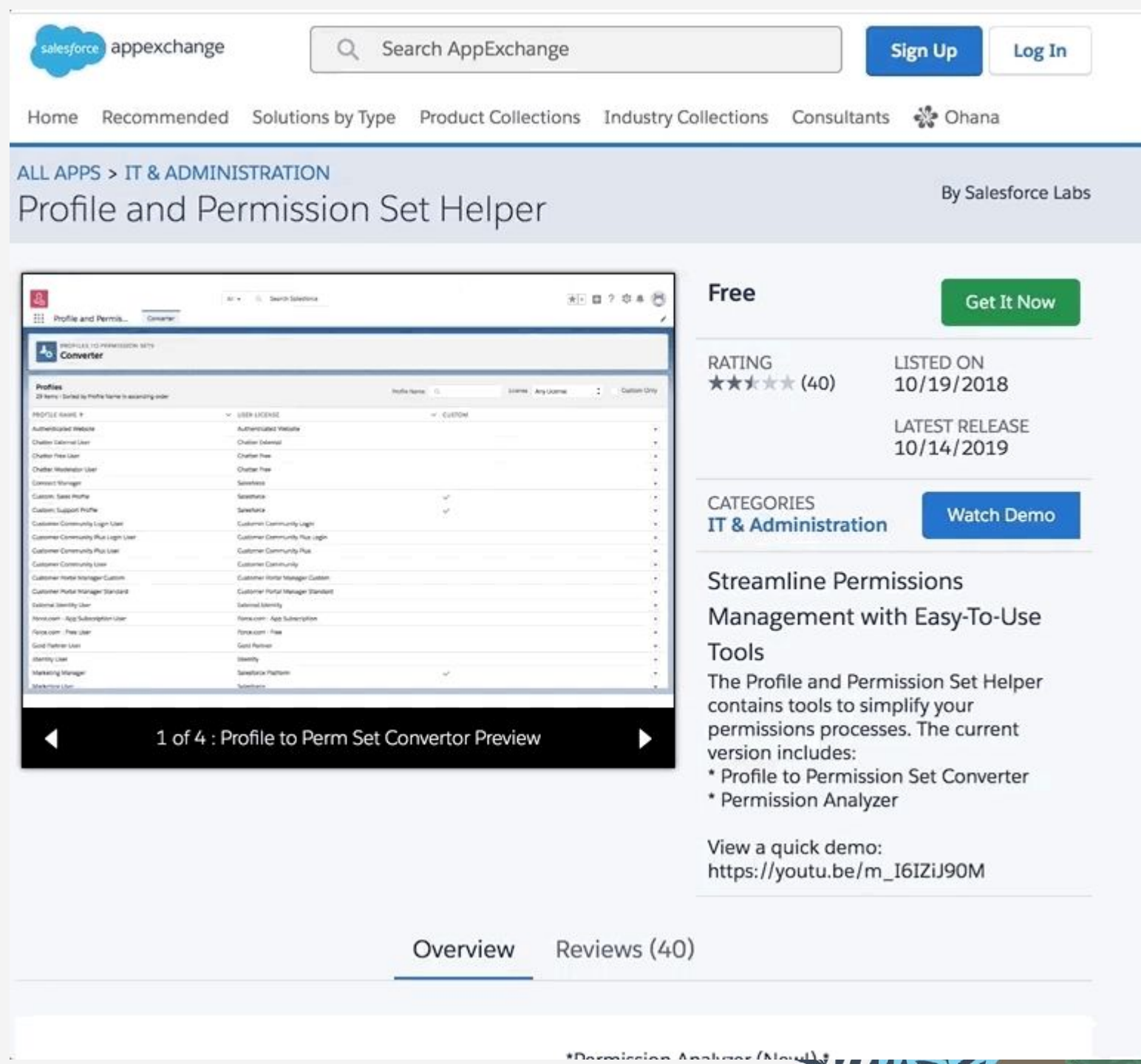- Prevents users from accessing information not pertinent to their job function.

Permission Set Group

What Can Move from Profiles to Permission Sets?

Determine what should be moved

User Permissions	- Access to Apps - System & User Management
Object/Field Access	
Tab Access	
Apex Class	
Visualforce Page	
External Integration	- External Services - Name Credentials - Connected Apps - Social Accounts
Custom Permissions	
Layout & Record	- Assigned Record Type - Default Record Type - Page Layout
Login Policy	- Login Hours & IP Ranges

YES → **Permission Sets**

NO

Extend Success with Salesforce Labs

Profile and Permission Set Helper

Look Ahead

Permission Set Group - Use Case Example

Arrange permissions to represent user job functions

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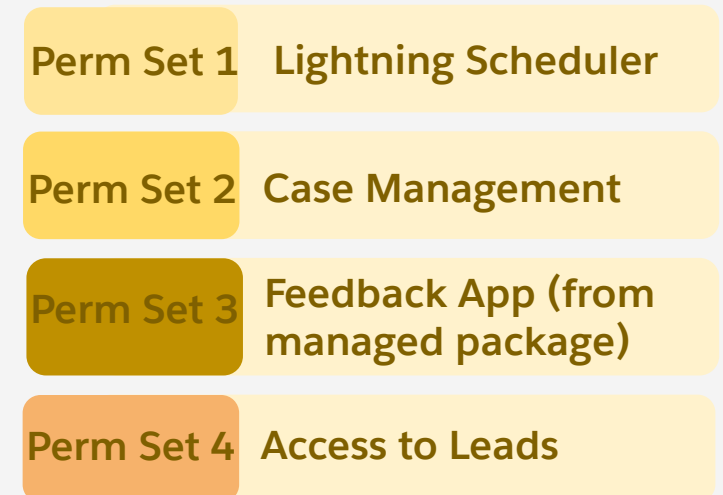| User Profile (1:1 Settings) | Permission Set Groups (Job Roles) | Permission Sets (Task Perms) |

User Profile (1:1 Settings)

Zero Permission Profile

Zero Permission Profile

Permission Set Groups (Job Roles)

Customer Support Tier 1
- Perm Set 1
- Perm Set 2
- Perm Set 3

Corporate Sales
- Perm Set 1
- Perm Set 4

Permission Sets (Task Perms)

Perm Set 1 — **Lightning Scheduler**

Perm Set 2 — **Case Management**

Perm Set 3 — **Feedback App (from managed package)**

Perm Set 4 — **Access to Leads**

Vision: Role Based Access Control

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User Profile

| 1:1 Settings |

Permission Set

| Job Roles |

Permission Sets

| Task Based |

Standard
Permission Set Group

Custom
Permission Set Group
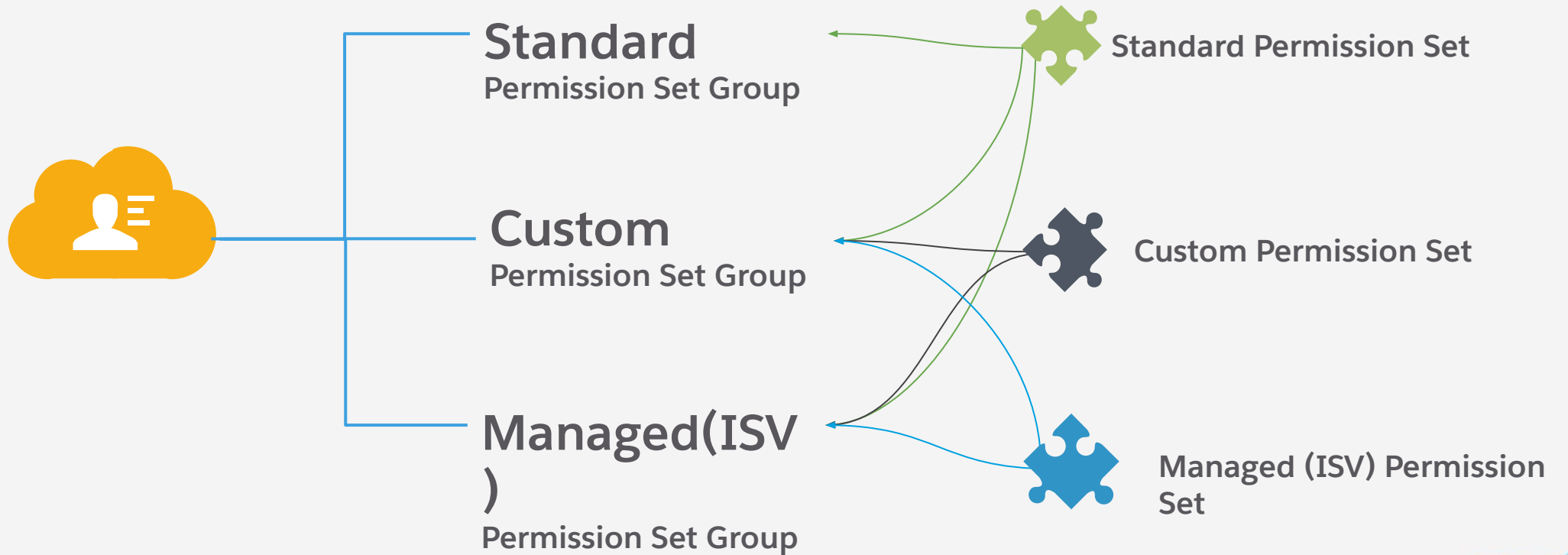
**Managed(ISV
)**
Permission Set Group

Standard Permission Set

Custom Permission Set

Managed (ISV) Permission
Set

Features in Future Roadmap

Productivity tools in Helper App
- Profile, Permission Set, User Comparisons
- Export Permission Analysis Report

Permission Set Group Enhancement
- Group Management for Delegated Admin
- Assign Object perms to Perm Sets during Object creation
- Automate group assignment based on user classifications

You can influence our roadmap:
- Give feedback on sfdc.co/psgcommunity
- Nominate & rate features in IdeaExchange
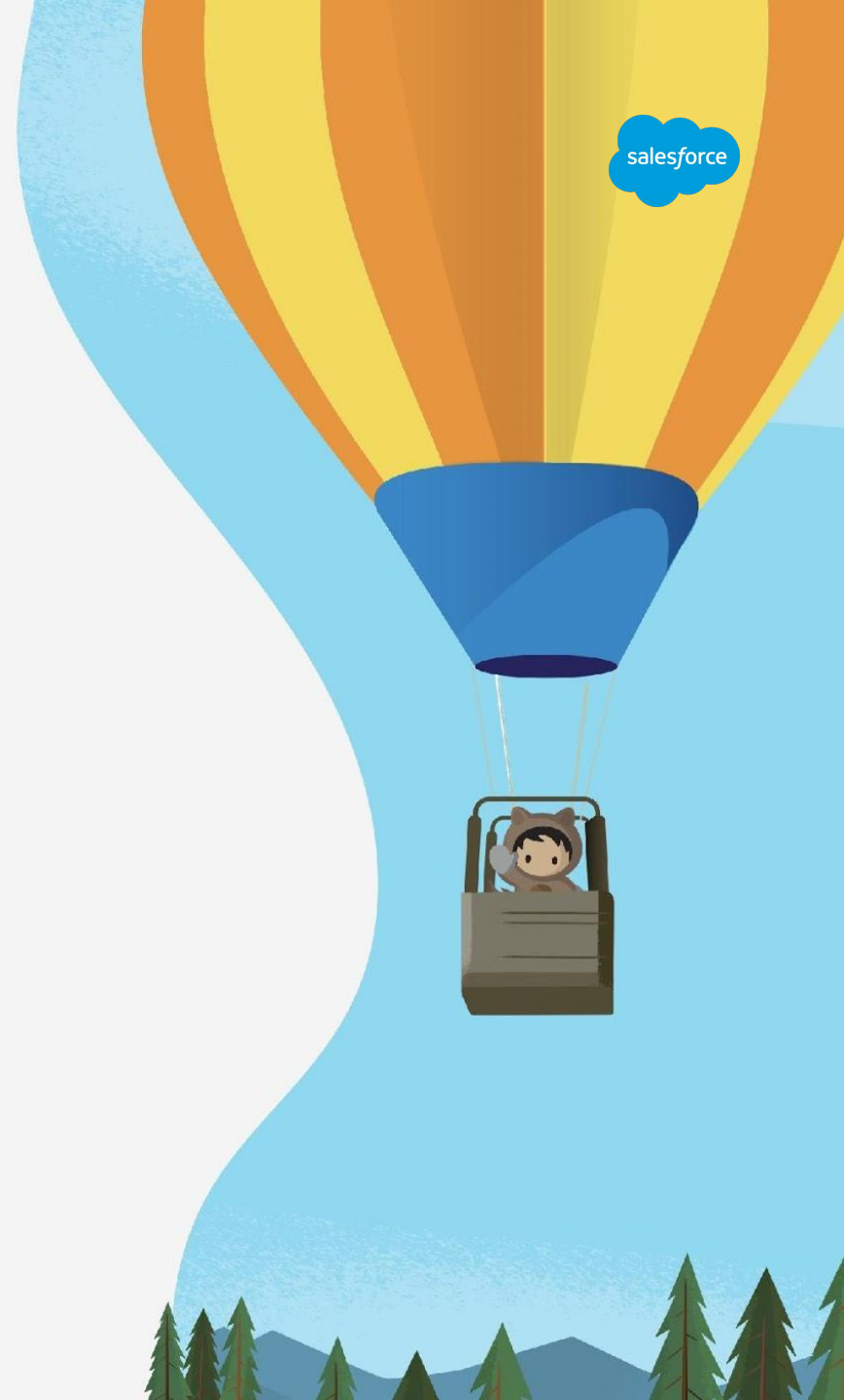
Trails & Additional Resources

- Admin Webinar sfdc.co/AdminWebinar2019PermissionBP

- Vision of Perm Management sfdc.co/PermManagementVision

- Untangling Profile (Developer Guide) sfdc.co/ProfiletoPermSetDevGuide

- Data Security Trail : bit.ly/DataSecurityBadge

- Perm Sets for Unlocked Packages Trail: bit.ly/PermSetsforUnlockedPackages