OrgChartPlus

Admin Permission Set

Version 7.0+

Access to OrgChartPlus Configuration for non-Salesforce Admins

Here we describe how to create a **Permission Set** that will provide non-Salesforce Admins with access to the **OrgChartPlus Configuration** page.

The following Permission Set in its standard form will allow access to all the key elements of the **OrgChartPlus Configuration** page with the exception of the **Customise Help** menu item.

The **Customise Help** feature enables you to change the .zip file containing the Help Documentation within Salesforce's **Static Resources**.

This feature is very rarely accessed directly by our clients because it has always required assistance from the **SalesMethods** support team to change the Help documentation.

But if you do need access to 'Custom Help' you can optionally add permissions to access **Setup and Configuration** and **Customize Application**. See the final page below.

But please be warned that providing non-Salesforce Admin users access to **Setup and Configuration** and **Customize Application** could put the security of your Salesforce Org at serious risk.
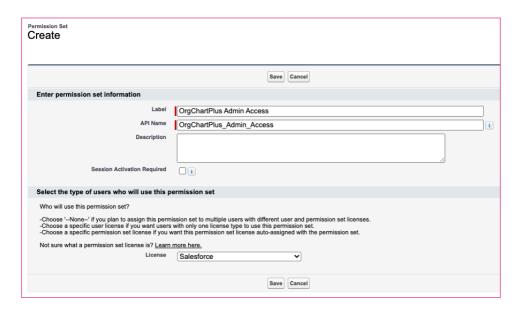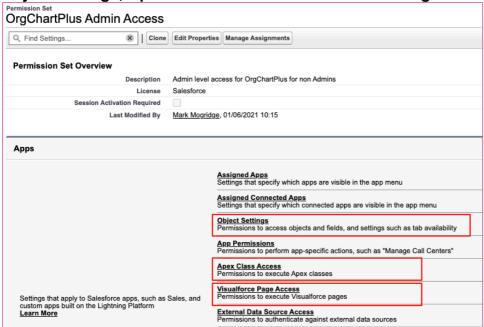
Creating the Standard Permission Set

💬Classic + ⚡Lightning | Setup > Users > Permission Sets

1. Click [New]
2. Label: OrgChartPlus Admin Access
3. API Name: OrgChartPlus_Admin_Access
4. License: Salesforce
5. Click [Save]

Permission Set
Create

	Save Cancel

Enter permission set information

Label	OrgChartPlus Admin Access
API Name	OrgChartPlus_Admin_Access ⓘ
Description	
Session Activation Required	☐ ⓘ

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here.

License	Salesforce ▼

Save Cancel

The standard permissions will be in the following sections:
Object Settings, Apex Class Access and **Visualforce Page Access** …

Permission Set
OrgChartPlus Admin Access

🔍 Find Settings... ✖ | Clone Edit Properties Manage Assignments

Permission Set Overview

Description	Admin level access for OrgChartPlus for non Admins
License	Salesforce
Session Activation Required	☐
Last Modified By	Mark Mogridge, 01/06/2021 10:15

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
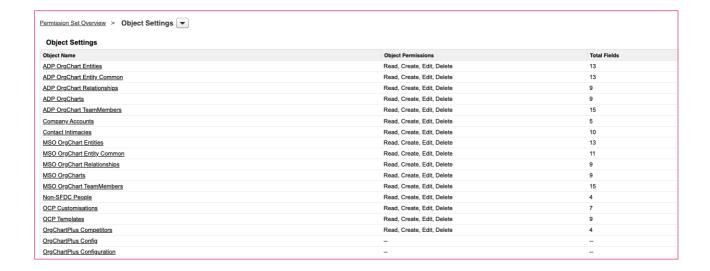Permissions to authenticate against external data sources

Object Settings

Ensure that the following Custom Objects…

- Have **Read, Create, Edit, Delete** permissions
- Exception: 'OrgChartPlus Config' = **Untick** 'Available' and 'Visible'
- Exception: 'OrgChartPlus Configuration = **Tick** 'Available' and 'Visible'

Object Name	Object Permissions	Total Fields
ADP OrgChart Entities	Read, Create, Edit, Delete	13
ADP OrgChart Entity Common	Read, Create, Edit, Delete	13
ADP OrgChart Relationships	Read, Create, Edit, Delete	9
ADP OrgCharts	Read, Create, Edit, Delete	9
ADP OrgChart TeamMembers	Read, Create, Edit, Delete	15
Company Accounts	Read, Create, Edit, Delete	5
Contact Intimacies	Read, Create, Edit, Delete	10
MSO OrgChart Entities	Read, Create, Edit, Delete	13
MSO OrgChart Entity Common	Read, Create, Edit, Delete	11
MSO OrgChart Relationships	Read, Create, Edit, Delete	9
MSO OrgCharts	Read, Create, Edit, Delete	9
MSO OrgChart TeamMembers	Read, Create, Edit, Delete	15
Non-SFDC People	Read, Create, Edit, Delete	4
OCP Customisations	Read, Create, Edit, Delete	7
OCP Templates	Read, Create, Edit, Delete	9
OrgChartPlus Competitors	Read, Create, Edit, Delete	4
OrgChartPlus Config	--	--
OrgChartPlus Configuration	--	--

APEX Class Access

1. Click [**Edit**]
2. Add the two **APEX Classes** shown below

Visualforce Page Access

1. Click [Edit]
2. Add the five **Visualforce Pages** shown below

Permission Set Overview > **Visualforce Page Access** ▾

Items per page: 50 Items ▾
View: All ▾

Visualforce Page Access   Edit

Visualforce Page Name
OrgChartPlus.ADPOrgChartEmbeddedView
OrgChartPlus.ADPOrgChartView
OrgChartPlus.MSOOrgChartEmbeddedView
OrgChartPlus.MSOOrgChartView2
OrgChartPlus.SMAcceptNewContact

Please read the next section on assigning this Permission Set to your Users.

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methods

Assigning the Permission Set

To Assign Users to this Permission Set ...

1. Click on the [Manage Assignments] button
2. Click the [Add Assignments] button on the next page
3. Tick the Users you which to assign
4. Click the [Assign] button

The assigned Users will now be able to access the **OrgChartPlus Configuration** page.

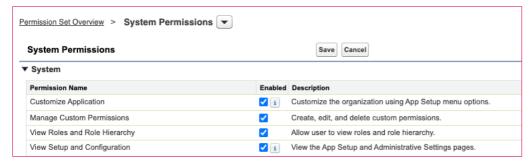# [Optional] Adding access to 'Customise Help'

WARNING: Providing non-Salesforce Admin users access to **Setup and Configuration** and **Customize Application** could put the security of your Salesforce Org at serious risk.

To allow the '**Customise Help**' feature in the **OrgChartPlus Configuration** page…

1. Click on the 'System Permissions' section of the Permission Set.

2. Tick the following options

Thank you for reading this

For any questions or further support
on using OrgChartPlus, please go to
https://salesmethods.com/support/
and complete the form.