



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.

OrgChartPlus Config
Home
Competitors
Team Members
Customize Help
Add Chart To Custom Object
Account Charts
Customize
Templates
Opportunity Charts
Customize
Templates



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]

The screenshot shows the 'Create' form for a new Permission Set. The form is titled 'Permission Set Create' and has 'Save' and 'Cancel' buttons at the top right. The main section is 'Enter permission set information' and contains the following fields:

- Label:** OrgChartPlus Admin Access
- API Name:** OrgChartPlus_Admin_Access
- Description:** (Empty text area)
- Session Activation Required:**

Below this section is 'Select the type of users who will use this permission set'. It includes instructions and a 'License' dropdown menu set to 'Salesforce'. 'Save' and 'Cancel' buttons are at the bottom.

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

The screenshot shows the 'Overview' page for the 'OrgChartPlus Admin Access' Permission Set. It includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' section contains the following details:

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

The 'Apps' section lists various permission categories, with three highlighted in red boxes:

- Object Settings:** Permissions to access objects and fields, and settings such as tab availability
- Apex Class Access:** Permissions to execute Apex classes
- Visualforce Page Access:** Permissions to execute Visualforce pages

Other categories listed include 'Assigned Apps', 'Assigned Connected Apps', and 'External Data Source Access'. A 'Learn More' link is provided at the bottom left.



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'

Permission Set Overview > Object Settings

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

Permission Set Overview > Apex Class Access

Items per page: 50 Items

View: All

Apex Class Name
OrgChartPlus.SM_OrgChartPlus
OrgChartPlus.SM_OrgChartPlusPage



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 Name
OrgChartPlus.ADPORGChartEmbeddedView
OrgChartPlus.ADPORGChartView
OrgChartPlus.MSOORGChartEmbeddedView
OrgChartPlus.MSOORGChartView2
OrgChartPlus.SMAcceptNewContact

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



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 first screenshot shows the 'Permission Set' page for 'OrgChartPlus Admin Access'. It includes a search bar and buttons for 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Manage Assignments' button is highlighted with a red box.

The second screenshot shows the 'Assigned Users' page for 'OrgChartPlus Admin Access'. It includes a 'Back to: Permission Set' link and buttons for 'Add Assignments' and 'Remove Assignments'. The 'Add Assignments' button is highlighted with a red box.

The third screenshot shows the 'Assign Users' page for 'Active Users'. It includes a 'View: Active Users' dropdown and 'Edit | Create New View' link. Below is a table with columns for 'Action', 'Full Name', 'Alias', and 'Username'. The 'Assign' button is highlighted with a red box. The first five rows of the table have their checkboxes checked, and the 'Assign' button is highlighted with a red box.

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.

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers
Permissions that let users switch to other websites using single sign-on.

2. Tick the following options

Permission Set Overview > **System Permissions** ▼

System Permissions Save Cancel

▼ **System**

Permission Name	Enabled	Description
Customize Application	<input checked="" type="checkbox"/> ⓘ	Customize the organization using App Setup menu options.
Manage Custom Permissions	<input checked="" type="checkbox"/>	Create, edit, and delete custom permissions.
View Roles and Role Hierarchy	<input checked="" type="checkbox"/>	Allow user to view roles and role hierarchy.
View Setup and Configuration	<input checked="" type="checkbox"/> ⓘ	View the App Setup and Administrative Settings pages.

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.

