

Rethink Existing Privacy Models

Don't die on the fly.

C. Sauer - 02.05.2024

Summary of Issue

<https://trailhead.salesforce.com/trailblazer-community/feed/0D54V00007XIPQUSA5>

- We are looking for tips on how to reorganize a privacy model from the ground up in Salesforce without impacting the existing privacy structure while maintaining increased privacy standards (FedRAMP compliance).
- We decided to ask a bunch of admins how they would approach this conundrum in the most impactful and least hectic manner.



What do fellow admins think?

My 2-cents on the topic is that we're headed towards reverse engineering permission sets based on Job Role. With the Perm Set Groups and the ability to create Muted Permissions, you can consider permission groups on as granting the most access, and then create muted permissions based on job role to reduce/prevent different access.

There is a pretty decent superbadge that covers this functionality.

- Matt Tragash

If it's a complicated org, I would start with figuring out how you would separate the functionality into packages from a deployment standpoint. Then, for each package, determine the common personas. Then build permission sets for those personas. Then I would use the new User Access Policies to setup the permission sets based on User info.

- Paul Fox

I definitely recommend permission set groups! It's a best practice move especially since permissions on profiles are going to be rolling back eventually and SF wants to push using permission sets and permission set groups. Curious to see how y'all do it. You should follow up once you finish! :)

- Arlinda Fasliu

My 1 cent on muting - We start with least privilege because of squirrels. If someone accidentally can't see PII, and you have to grant permissions, that is way less intense than if you were just about to add a muting permissi...SQUIRREL - What was that Ad for? Why are the dogs barking? Do I need new license plate bolts? Now, where was I? Oh yeah permissions... And then had a data breach because someone forgot to mute. I am guessing that Matt Tragash knows all of this - because some people also need to look like they have access. And then have a tiny muting perm slapped on the when they break the feed a third time...

- Becca Morgan

Resources

It's like MapQuest, but better.

- Muting Permission Set Groups - https://help.salesforce.com/s/articleView?id=sf.perm_set_groups_create_mute.htm&type=5
- User Access Policies - https://help.salesforce.com/s/articleView?id=sf.perm_user_access_policies.htm&type=5
- 8 Salesforce Permission Sets Tips - <https://www.salesforceben.com/salesforce-permission-sets-tips/>