



# MANAGE BULK PERMISSION SET LICENSE (PSL) ASSIGNMENTS FOR HEALTH CLOUD

## Assign Health Cloud Permission Sets and Licenses to Multiple Users

You can streamline administration by using Data Loader and a spreadsheet to assign permission set licenses in bulk.

Permission set licenses and permission sets have different purposes. Permission set licenses extend the functionality of a user license, and permission sets extend a user's functional access without changing a user's profile. When you assign a permission set, you're also assigning the associated permission set license.

Before you assign or unassign Health Cloud permission sets and permission set licenses, make sure you meet these requirements:

- You must have administrator permissions and access to the Company Information panel of your org.
- You must have Salesforce Data Loader installed so you can obtain users' internal IDs as well as the internal IDs of the Health Cloud permission sets. For more information, see [Data Loader documentation](#).
- You need a spreadsheet application that handles CSV files, such as Microsoft Excel or Google Sheets.

## Bulk-Assign a Health Cloud Permission Set or License

To bulk-assign a Health Cloud permission set and permission set license for multiple users, you need the unique ID of the permission set and the unique ID of each user.

1. Check to see how many licenses are assigned. In Setup, go to **Company Settings > Company Information**, and click **Permission Set Licenses**.

Under Permission Set Licenses, check that you have enough Health Cloud licenses for all the users you want to assign.

2. In Data Loader, click **Export**, log in, and grant access to the company org.
3. Click **Show all Salesforce objects** and select the **User** object.
4. Enter a unique name for the new CSV file (for example, `User_Extract.csv`), browse to where you want to download the generated file, and click **Next**.
5. Select **Id**, **LastName**, and **FirstName**, then click **Finish**.

 **Tip:** To locate only active users, set **IsActive** to **true**.

6. Confirm that the downloaded CSV file has three columns: User ID, Last Name, and First Name.

You only need the ID, but the last and first names make it easier to identify the user.


7. Back in the Data Loader Export tab, click **Show all Salesforce objects** and select **Permission Set**.
  - a. Give the target a unique file name (for example, `PermSet_extract.csv`), and click **Next**.

- b. In the panel of query fields, enter this SQL query in the text box, replacing `<Permission_Set_APIName>` with the appropriate permission set API Name: `Select Id, Name, Label FROM PermissionSet WHERE Name = '<Permission_Set_APIName>'`.

For example, the permission set API Name for the Health Cloud Permission Set License permission set is `HealthCloudPermissionSetLicense` and the API Name for the Health Cloud Starter permission set is `HealthCloudStarter`. You can find the permission set API name in Setup by searching for Permission Sets, then clicking the Permission Set Label to view details.

- c. Click **Finish** and then **Yes** to confirm that you want to proceed.

A single record is created and downloaded.

8. In the downloaded file, copy the unique ID for the Health Cloud permission set.
  - a. Open a new CSV spreadsheet and enter headings to the first two columns: *PERMISSIONSETID* and *ASSIGNEEID*.
  - b. Copy the user IDs from the *User\_Extract.csv* file, and paste them into the spreadsheet's ASSIGNEEID column.
  - c. Open the *PermSet\_extract.csv* file. It has a single row of data. Copy the first field, which is the internal ID for the Health Cloud permission set, and paste it into the spreadsheet's PERMISSIONSETID column for each user.
  - d. Save the spreadsheet with a name like *PermSetAssignments.csv*.
9. Back in Data Loader, on the Upsert tab, click **Show all Salesforce objects**, and select the object **Permission Set Assignment**. Browse to the *PermSetAssignments.csv* file and click **Next**, and click OK. Confirm that the Id field is shown as matching the PermissionSetAssignment. Click **Next**.
10. Select the CSV field to map to the Id field of the permission set, and click **Create Map**.
  - a. From the list of fields, drag **AssigneeId** to the ASSIGNEEID row in the mapping table.
  - b. Drag **PermissionSetId** to the PERMISSIONSETID row, then click **OK** and then **Next**.
    -  **Tip:** You can save this mapping for later use.
  - c. Choose where to save the success and error files, and click **Finish**.
11. Under Company Information in Setup, check the Permission Set Licenses and Permission Sets tables to verify that the licenses and permission sets have been assigned.

## Bulk-Unassign a Health Cloud Permission Set or License

To unassign a permission set and permission set license for multiple users, you'll need the users' internal IDs, the ID of the permission set, and the ID of the permission set license.

1. In Data Loader, from the Export tab, log in and grant access to the company org.
2. Click **Show all Salesforce objects**, and select the **User** object.
3. Enter a unique name for the new CSV file (such as *User\_Extract.csv*), and browse to where you want to download the generated file. Click **Next**.
4. Select **Id**, **LastName**, and **FirstName**.
5. Click **Finish**, then click **Yes**.
6. Confirm that the downloaded file has three columns: the user's unique ID, last name, and first name.
7. Back in the Data Loader Export tab, get the permission set ID.
  - a. Click **Show all Salesforce objects** and select **Permission Set**.
  - b. Give the target a unique file name (for example *PermSet\_extract.csv*) and click **Next**.
  - c. In the panel of query fields, enter the following explicit query into the text box, replacing *<Permission\_Set\_APIName>* with the appropriate permission set API name: *Select Id, Name, Label FROM PermissionSet WHERE Name = '<Permission\_Set\_APIName>'*.

For example, the permission set API Name for the Health Cloud Permission Set License permission set is *HealthCloudPermissionSetLicense* and the API Name for the Health Cloud Starter permission set is

HealthCloudStarter. You can find the permission set API name in Setup by searching for Permission Sets, then clicking the Permission Set Label to view details.

- d. Click **Finish**, then **Yes** to confirm and start the export.

A single record is created.

8. Open the downloaded file and copy the ID for the Health Cloud permission set.
9. Back in the Data Loader Export tab, get the unique internal Id for the permission set license.
  - a. Click **Show all Salesforce objects** and select **Permission Set License**.
  - b. Give the target a unique file name (such as `PermSetLicense_extract.csv`) and click **Next**.
  - c. In the panel of query fields, enter this SQL query, replacing `<Permission_Set_APIName>` with the appropriate permission set API name: `Select Id, DeveloperName, MasterLabel FROM PermissionSetLicense WHERE MasterLabel = '<Permission_Set_APIName>'`. Click **Finish** and then **Yes**.  
This query creates a single record.
10. In the downloaded file, copy the ID for the Health Cloud permission set license.
11. Create a list of users currently assigned to the permission set by querying for the permission set ID.
  - a. In the Data Loader Export tab, click **Show all Salesforce objects** and select **Permission Set Assignment**.
  - b. Give the target a unique file name (such as `PermSetAssignment_extract.csv`) and click **Next**.
  - c. In the panel of query fields, enter this SQL query: `Select Id, PermissionSetId, AssigneeId FROM PermissionSetAssignment WHERE PermissionSetId = 'YOUR_UNIQUE_PERMSET_ID'`.  
Use your permission set Id in place of `YOUR_UNIQUE_PERMSET_ID`.
  - d. Click **Finish** and then **Yes** to confirm and start the export.
12. Open the downloaded CSV file and identify which user IDs you want to unassign the permission set. Delete all the rows from the permission set assignment file for those users you want to keep the permission set.  
The file should only contain rows of assigned users you want to unassign from the Health Cloud permission set.
13. Back in Data Loader, click the **Delete** tab.
  - a. Click **Show all Salesforce objects** and select **Permission Set Assignment**.
  - b. Choose your prepared permission set assignment CSV file (`PermSetAssignment_extract.csv`) and click **Next**.
  - c. Click **OK** to verify the correct number of rows to be deleted.
  - d. The next panel shows the three fields in the CSV file, and asks you to select the CSV fields to be mapped. Click **Create Map**, and in the next panel select **Auto-Match Fields to Columns**. The ID field is mapped to Id. Click **OK**, then **Next**.  
You can save this mapping for use in future bulk unassigns.
  - e. Specify where you would like to save the success and error files, then click **Finish**, then **Yes**.
  - f. Confirm the Recycle Bin information, and click **Yes** to start the job.
14. Verify that the users have been unassigned from the Health Cloud permission set.
15. Create the list of users currently assigned to the permission set license by querying for the permission set license ID. Return to the Data Loader and Export tab.
  - a. Click **Show all Salesforce objects** and select **Permission Set License Assignment**. Give the target a unique file name (for example, `PermSetLicenseAssignment_extract.csv`) and click **Next**.

