Clone This User - Installation Guide for Lightning

August 6, 2019 - Version 1.3

Overview

The general idea for this product comes from the instant need that many admins have from time to time for a new user. Creating the new user often comes in as an ad hoc request to duplicate one user for this new one. We imagined the scenario that an urgent email comes in to the Salesforce Administrator from the hiring manager while the administrator is out at lunch; how could the admin quickly and easily create the user record with all the related permission sets, public group access, and user features selected?

With Clone This User, the administrator can look up the existing user that serves as the basis for the new one, enter name and email, and generate the username and password immediately. They can do this from a mobile device or a browser with very few clicks and only one screen, vastly improving the experience of generating that nearly identical user record. The purpose of this release is to provide even more flexibility in how to clone Users while in Lightning.

Note that there are two ways you can access Clone This User (in both Classic and Lightning). Those are: through Setup and on the User record (custom links), or through the AppLauncher by clicking the "Clone This User" object.

New advancements for our Lightning roll out include adding Clone This User as a Lightning Component to any page as well as adding Clone This User as a utility item. The CTU utility item is great for the pop out function (i.e. put Clone This User directly next to that spreadsheet you are referencing).

Technical Requirements

Salesforce.com Supported Versions: Professional Edition, Enterprise Edition, Performance / Unlimited Edition, Developer Edition
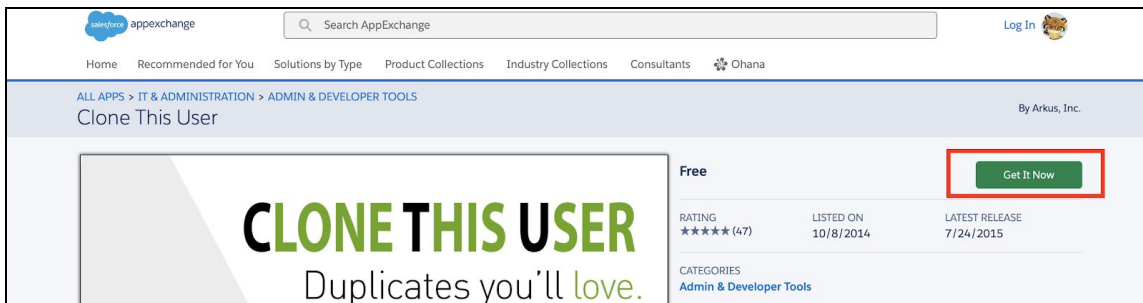
Support

For support related to Clone This User, you can email support@arkusinc.com or call (888) 271-1963 and leave a message.
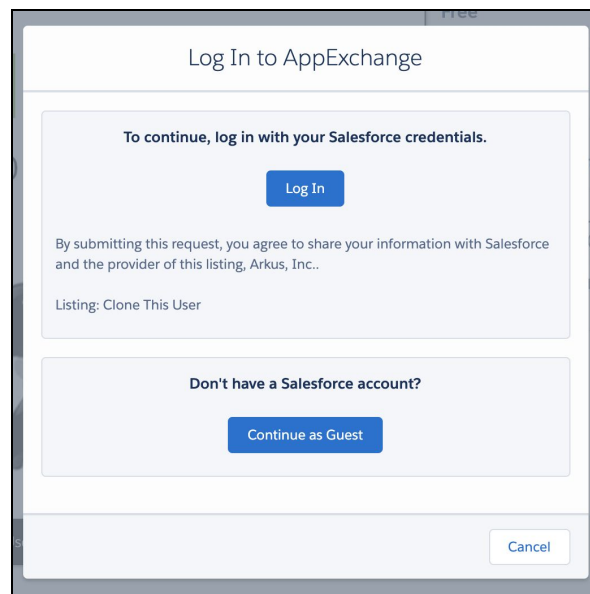
Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install Clone This User, follow the instructions below.
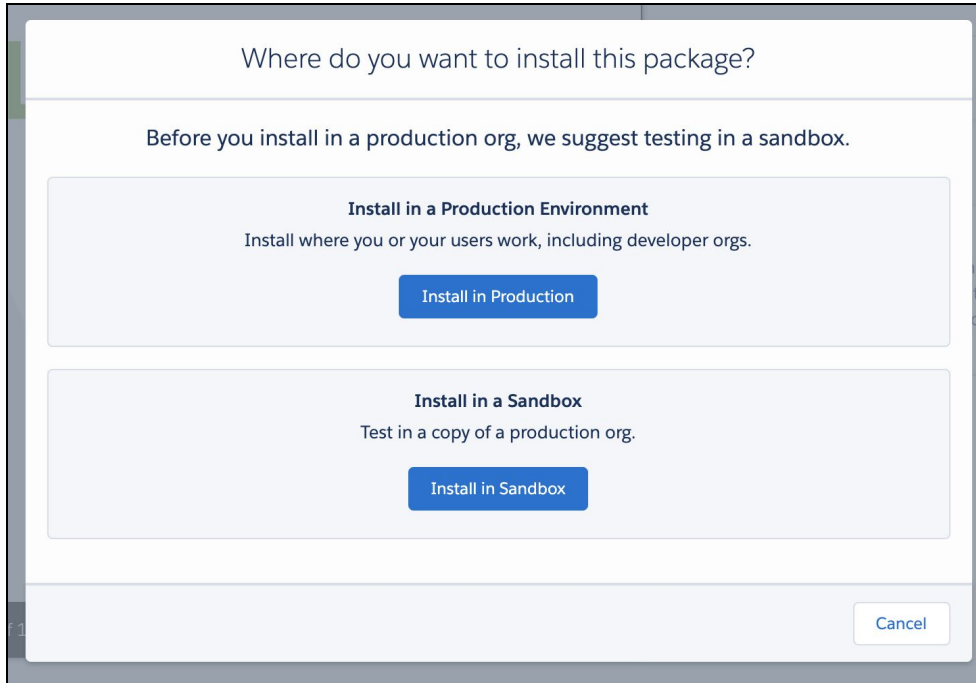
1. Navigate to this link:
   https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5jTkEAJ

2. Click "Get It Now"

3. Click "Log In"

4. Select if you would like to install in Production or Sandbox

5. Confirm your details
   ○ You may have to edit/update your Title and other credentials
   ○ Click "Save" when you have finished those steps
6. Click **"Confirm and Install"**
   ○ Salesforce will have you log into your environment again to confirm your identity
7. Select your security level
   ○ We recommend that you **"Install for Admins Only"**, as Clone This User will likely be used by system administrators.
   ○ In the event that your org has different policies, you can "**Install for All Users"** or "**Install for Specific Profiles"** which will allow you to provide access for your specific needs.

8. Click "**Install"** to start installing the package into your Salesforce environment.
   ○ **NOTE***: Professional Edition users will not have this step.
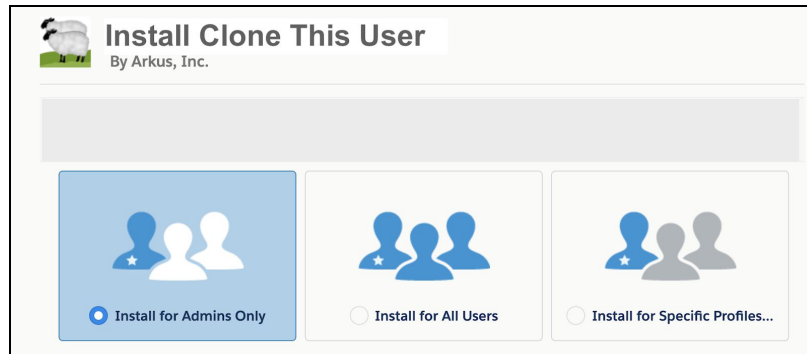
9. After the installation occurs, you will see the Installation Complete page notifying you that the package installed has been successful.
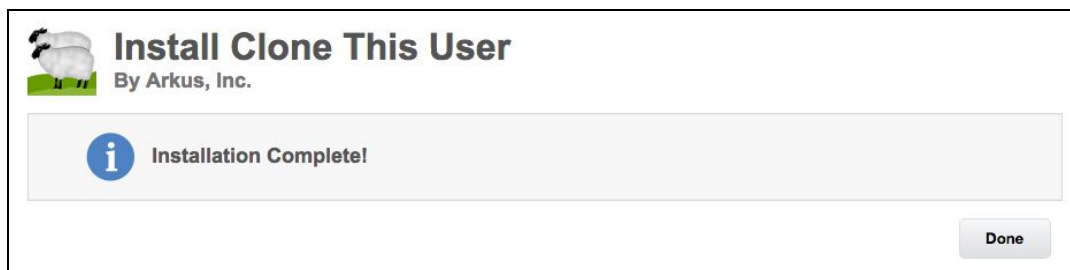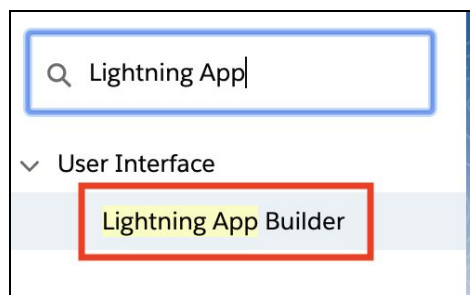

Lightning Component

With our Lightning release, you can now add Clone This User to any Lightning page. We recommend the Home page for those Users that are cloning frequently.

Note: You will need to enable My Domain to utilize any Custom Lightning Component. For the complete steps, please go to help.salesforce.com and search for "My Domain" or click HERE.

1. In Setup → Lightning App Builder

2. Select the Lightning page you would like to add the component to
3. Click "Edit"
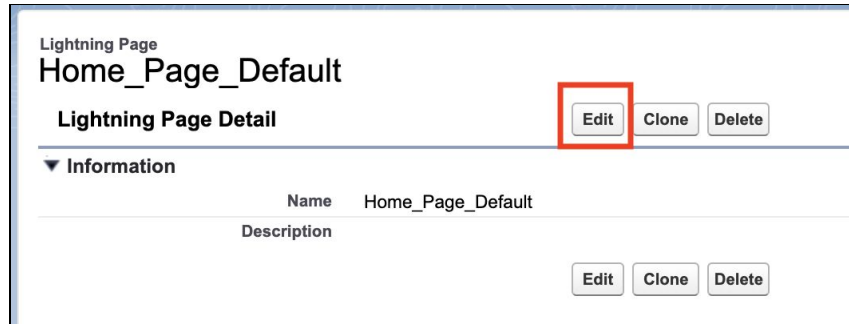
4. Under "Custom", locate "lwcCloneThisUser"
   ○ Note: There are 2 components for Clone This User
      ■ "CloneThisUser" is the original component that does not contain our upgrades/changes
      ■ Please use "lwcCloneThisUser" instead
   ■ The acronym "lwc" stands for Lightning Web Component
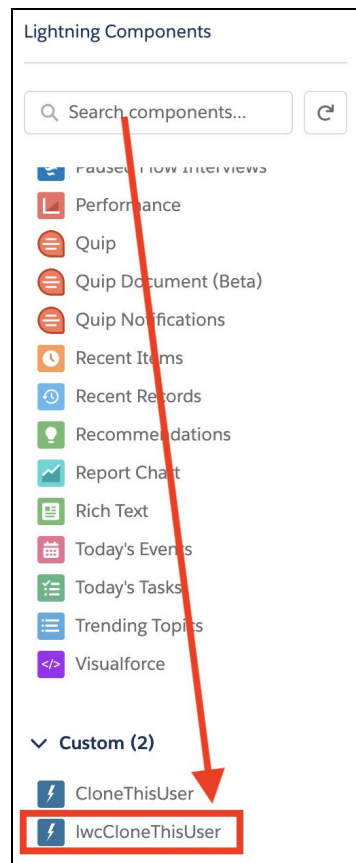
5. Drag the "lwcCloneThisUser" component to the page and click save.
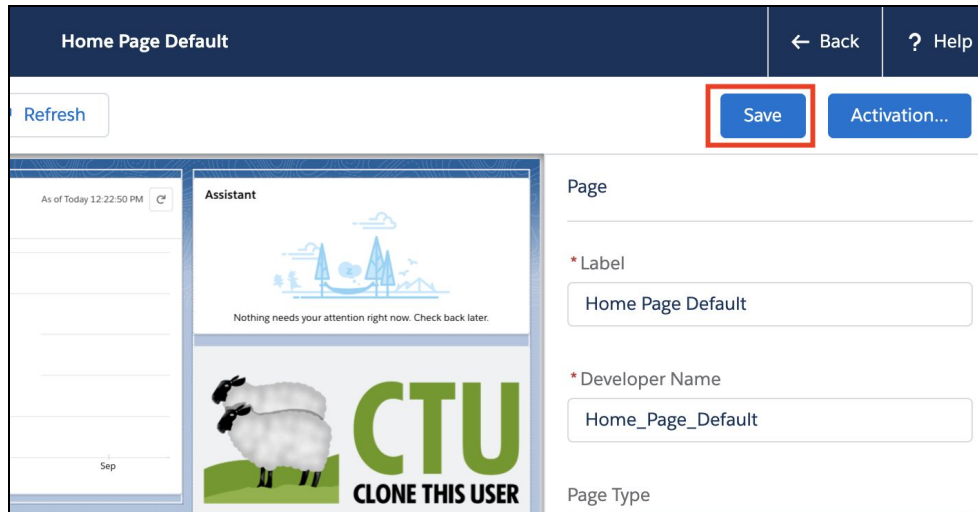

Lightning Utility Bar

Another addition to our Lightning rollout includes the use of the Lightning utility bar. The pop-out function is a great tool if you are referencing a document/spreadsheet for your new User's details. To enable the utility bar pop-out function, be sure to complete the Critical Update associated (click HERE for details).
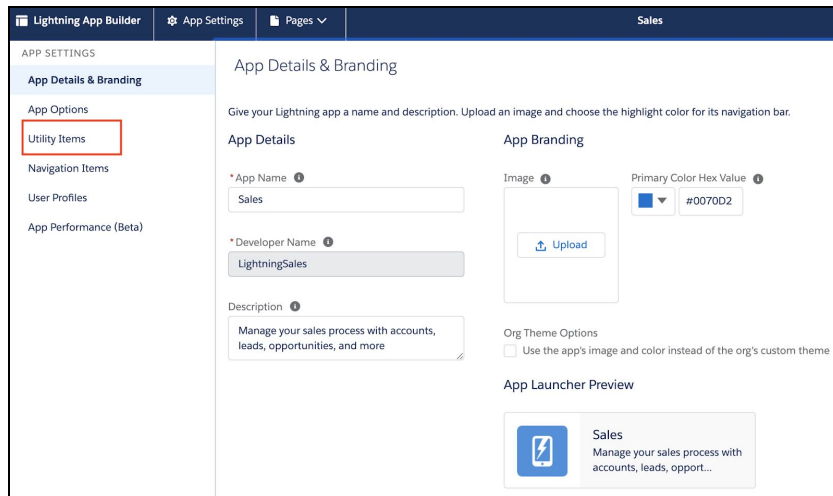
1. In Setup → "App Manager"
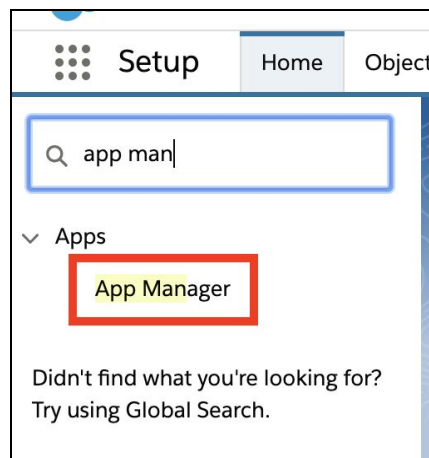
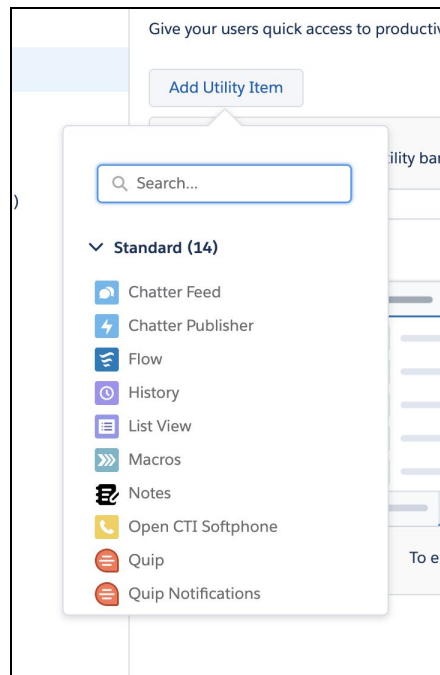2. Locate the App where you would like to add the Utility Bar

3. Select the drop down arrow → Click "Edit"
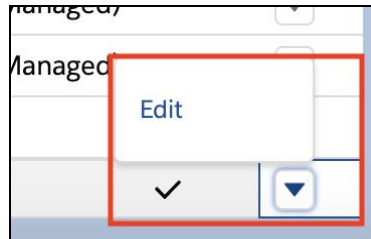

4. Locate "Utility Items"

5. Click "Add Utility Item"

6. Type "Clone This User"

7. Under "Custom" select "lwcCloneThisUser"
   - ○ Note: There are 2 components for Clone This User
     - ■ "CloneThisUser" is the original component that does not contain our upgrades/changes
     - ■ Please use "lwcCloneThisUser" instead
     - ■ The acronym "lwc" = Lightning Web Component

8. Leave the default Properties as they are
   - ○ Note: It is safe to change the "Label" and "Icon," but for best use leave the width and height as is. You do not need to check the "Start automatically" checkbox.
     - ■ For the Label, we recommend changing it to "Clone This User"
   - ■ For the icon, we recommend "adduser"

9. Click "Save"
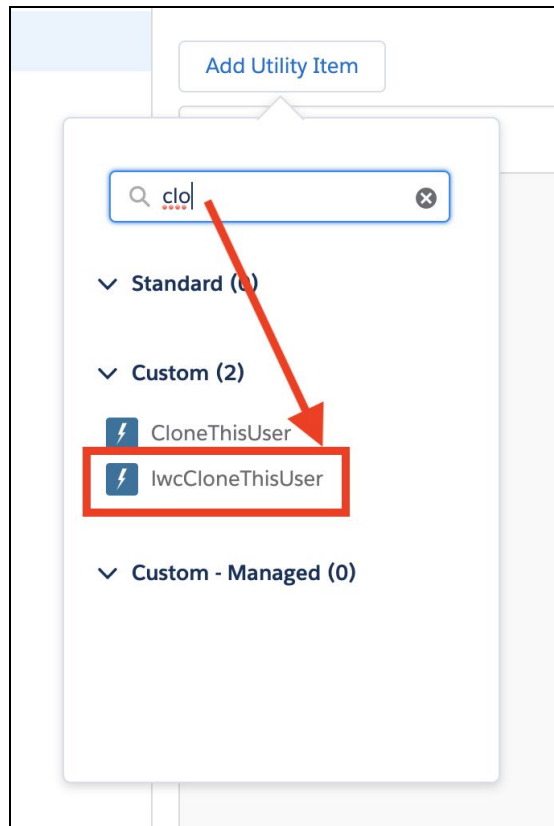
Mobile Setup in Lightning

Now that you've completed the install of the package, if you would like CTU to be available on mobile devices, you'll need to follow these steps:

1. In the Setup → Apps → Mobile App → Salesforce → Salesforce Navigation
   - Or search for "Salesforce Navigation"
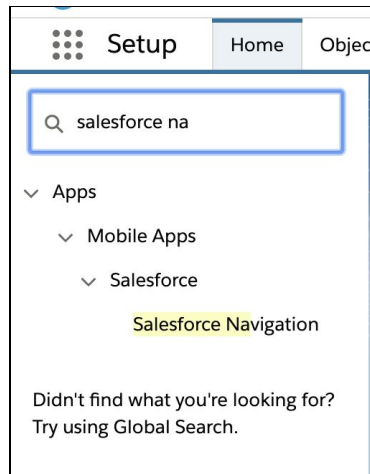
2. Under Salesforce Navigation, you will see Navigation Menu Items → Select "Clone This User" and click the "Add" arrow move it to "Selected".
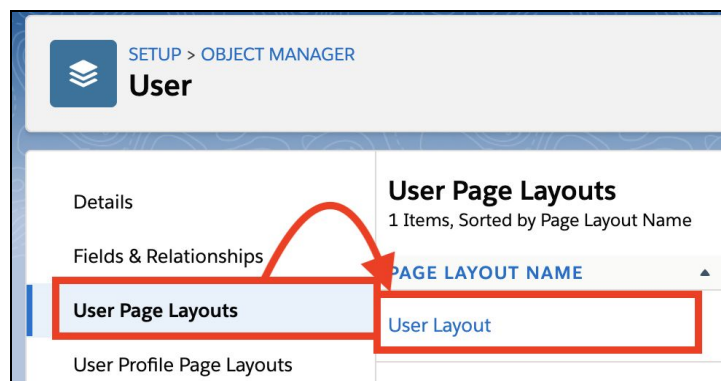
3. Click "Save"
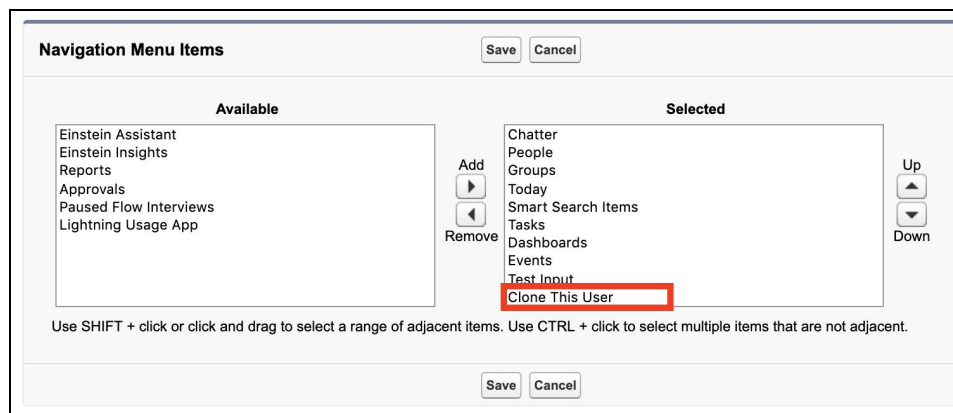
Custom Link on User Page Layout

You can also add a custom link on all User records to easily clone a user from their user record. In order to add the custom link to the User Page Layout, follow these steps.
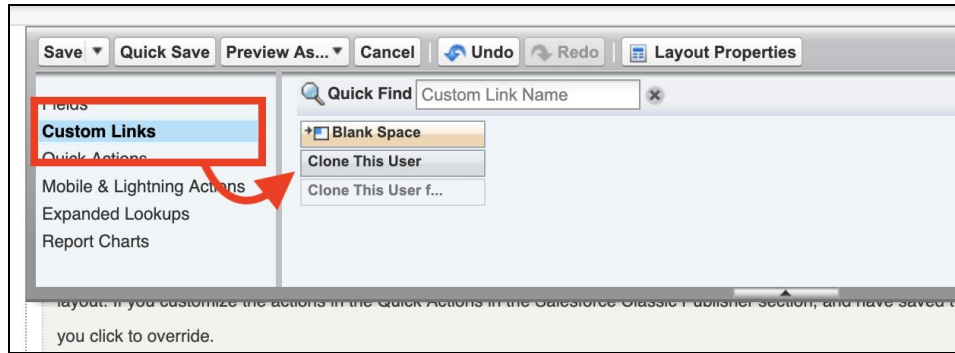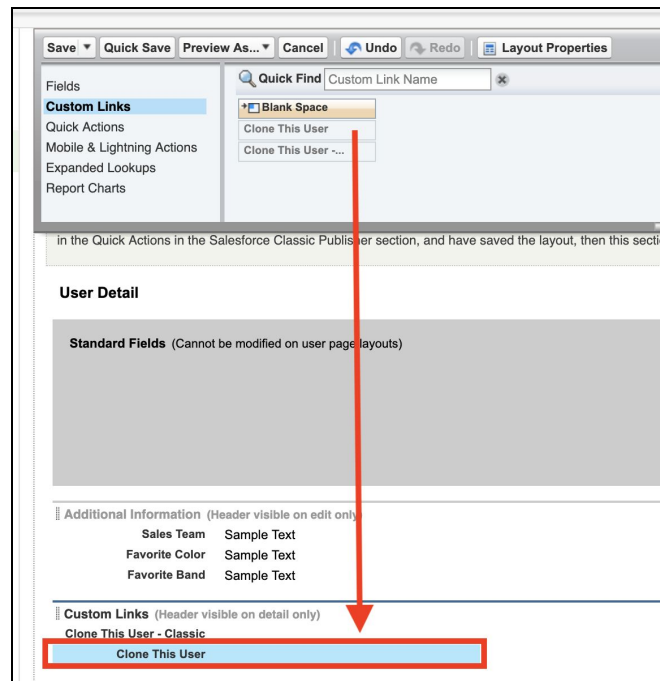
1. In Setup, click "Object Manager"

2. Locate "User"
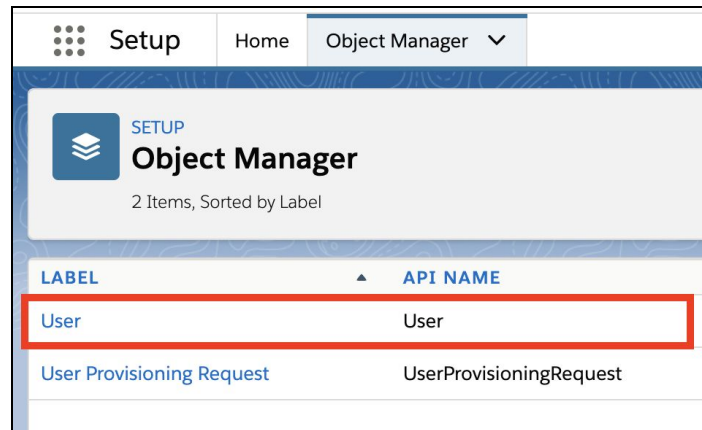
3. Click on "User"

4. Click on "User Page Layout"

5. Click on the User Page Layout where you would like to add the Custom Link

6. Click "Custom Links"

7. Drag and drop "Clone This User"

Note: There are 2 custom link for Clone This User.
- Clone This User - Classic: This is the custom link that should be used in Classic.
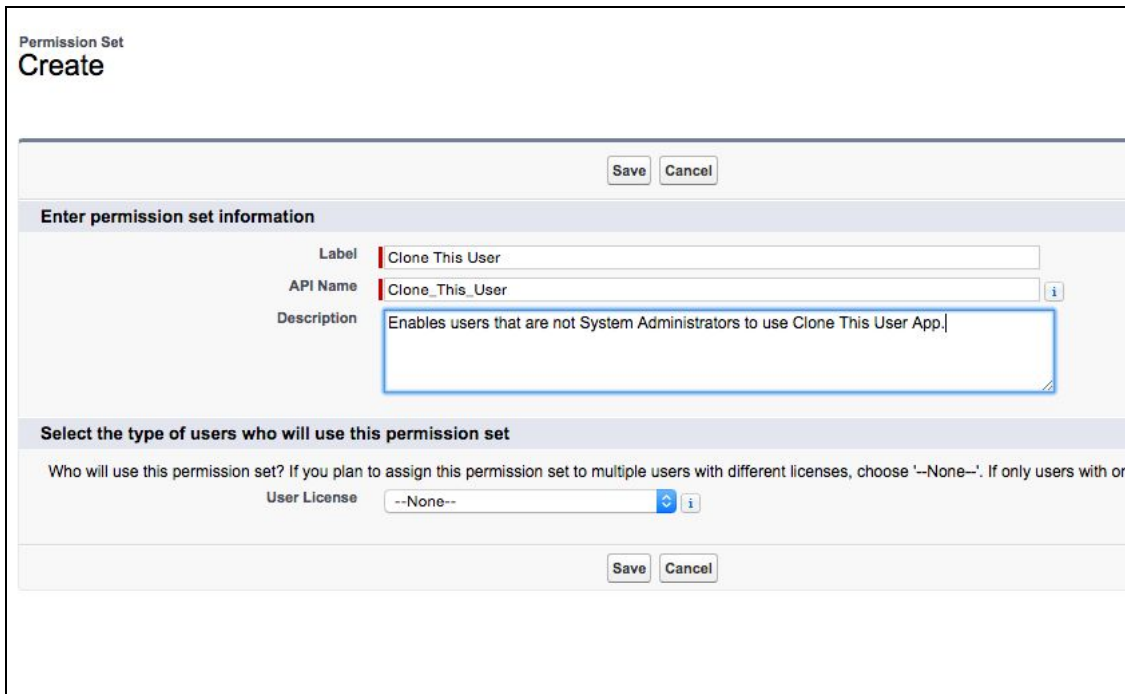- Clone This User: This is the custom link that should be used in Lightning.

8. Click "Save"

9. You are now ready to use Clone This User!

Non-Admin Users: Visualforce Permission Sets

Do you have a non-System Administrator User that can clone Users? They must be assigned a permission set to gain access to the necessary Visualforce pages. You also need to follow this step for any other delegated admins.

1. Setup → "Users" → "Permission Sets"
   - Or search "Permission Sets"

2. Click "New"

3. Enter this info:
   - Label: "Clone This User"
   - APU Name: Auto-populates
   - Description: Enables users that are not System Administrators to use Clone This User app.

4. Click "Save"

Permission Set
Create

Save Cancel

Enter permission set information

Label	Clone This User
API Name	Clone_This_User
Description	Enables users that are not System Administrators to use Clone This User App.
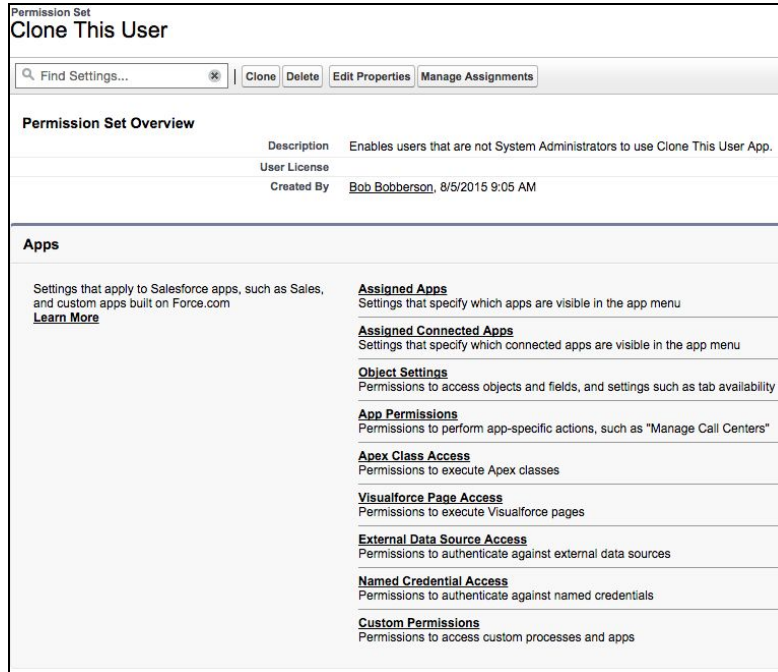
Select the type of users who will use this permission set

Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '--None--'. If only users with on

User License --None--

Save Cancel

5. Under "Apps" select "Visualforce Page Access"

6. Click "Edit"

7. Under "Available Visualforce Pages" → Select all the Clone This User Visualforce pages

8. Click "Add" to add them to "Enabled Visualforce Pages"

9. Click "Save"

10. Add the new Permission Set to your Users:

○ Click on "Manage Assignments"

○ Click "Add Assignments"

11. Check the box next to the User(s) you wish to assign the Permission Set

12. Click "Assign"

13. Click "Done"

Provide Arkus Feedback

If you would like to provide feedback about Clone This User, please leave a review on the AppExchange product listing or send us an email to support@arkusinc.com. We are continually building upon Clone This User to increase its functionality and usefulness.

If you are interested in learning more about Arkus and additional applications that we have developed, visit us at www.arkusinc.com.