Arkus

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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 & password immediately. And 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 users with even more flexibility about what gets cloned and better visibility of the cloned items.

We have included an Advanced Options drop down menu that allows the administrator to select what values get cloned and which do not. Additionally, we have redesigned the confirmation page to include a lot of information about the clone and a link to managed packages at the end of the page.

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, call (888) 271-1963 and leave a message or @ArkusSupport on Twitter with any questions or issues.
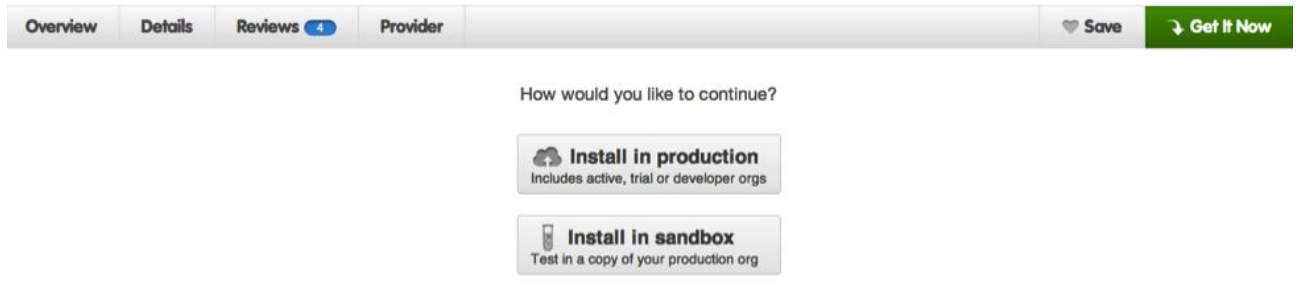
Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install Clone This User, follow the instructions below.

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1. Navigate to the link below in your browser and click **Get It Now**.
    https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5jTkEAJ
2. You are prompted to see if you have a Salesforce account, or you can log in as a guest, and in which environment you want to install Clone This User. We recommend that you install Clone This User to your Sandbox environment to test and evaluate the application before installing the package in your production environment. Click **Continue**.

3. Confirm that you have read the Terms & Conditions, and click **Install**. You will be prompted to verify your password before the Clone This User package begins the installation process.

4. The Package Installation Details page provides you information about what you are installing with the Clone This User package, and exactly where you are installing Clone This User. Confirm the information and **agree to the terms and conditions**. Then click **Confirm and Install** button.

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Almost there!

ⓘ Before installing, please review the **customization guide** to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE
Clone This User

VERSION
CTU: Clone This User (Summer 2015 / 1.1.0)

SUBSCRIPTION
Free

DURATION
Does Not Expire

NUMBER OF SUBSCRIBERS
Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION
Dodge Labs / Arkus

EDITION
Developer

USER NAME
rogeramitchell@gmail.com.advdev

☐ I have read and agree to the **terms and conditions** .

Cancel Install | Back to previous step

Confirm and Install!

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please click here for detailed information on what is and is not included in this review.

5. Choose the security level in Step 2 of the installation. We recommend that you **Grant access to 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. Click **Install** to start installing the package into your Salesforce environment.

NOTE: Professional Edition users will not have this step.

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Install Clone This User
By Arkus, Inc.

Install for Admins Only	Install for All Users	Install for Specific Profiles...
●	○	○

Install   **Cancel**

App Name	Publisher	Version Name	Version Number
Clone This User	Arkus, Inc.	Summer 2015	1.1

Description

With Clone This User (CTU), 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 & password immediately. Clone Users from the desktop or Salesforce1 Mobile.

Additional Details   View Components   API Access

6. After the installation occurs, you will see the Installation Complete page notifying you that the package installed has been successful.

Install Clone This User
By Arkus, Inc.

ⓘ **Installation Complete!**

Done

App Name	Publisher	Version Name	Version Number
Clone This User	Arkus, Inc.	Summer 2015	1.1

Description

With Clone This User (CTU), 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 & password immediately. Clone Users from the desktop or Salesforce1 Mobile.

App Setup

Now that you've completed the install of the package, you'll need to finish installation by setting up the package components.

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1. In the Setup area, under Administer, click Mobile Administration and select Mobile Navigation.
2. Under Available Navigation Menu Items, select Clone This User and add the Clone This User item to the list of selected Navigation Menu Items and **Save**

3. Next, under Customize, click Users, and select Page Layouts.
4. On the User layout, select **Custom Links** and use the Quick Find in the editor to find the Clone link.

5. Drag it onto your page layout **Custom Links** section and **Save**.

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

Visualforce Permission Sets for non Admin users

Please note that in order for a non system admin user to be able to use Clone This User they must be assigned a permission set to gain access to the necessary Visualforce pages. You also need to follow this step for delegated admins.

![Arkus logo]

1. In the Setup menu under Manage Users select Permission Sets and click New enter the necessary information and click Save.

Permission Set
Create

	Save Cancel

Enter permission set information

Label	Clone This User
API Name	Clone_This_User [i]
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-- [i]

	Save Cancel

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2. Under Apps select Visualforce Page Access then click Edit

Permission Set
Clone This User

| 🔍 Find Settings... ⊗ | | Clone | Delete | Edit Properties | Manage Assignments |

Permission Set Overview

Description	Enables users that are not System Administrators to use Clone This User App.
User License	
Created By	Bob Bobberson, 8/5/2015 9:05 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
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

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

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3. Select all the Clone This User Visualforce pages from the **Available Visualforce Pages** and move them over to the **Enabled Visualforce Pages** then click **Save**

4. Click on **Manage Assignments** and **Add Assignment Assignments**
5. Select the users you wish to assign the Permission Set to and click **Assign** then **Done**

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Provide Arkus Feedback

If you would like to provide feedback about Clone This User, please leave a review on the AppExchange product listing, send us an email to support@arkusinc.com or @ArkusSupport on Twitter with your comments. 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, view the link below.
http://www.arkusinc.com/products/

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