

Installation Guide

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Limitations to take into account before the installation



Caution: it is important to note that there are certain limitations to this app brought on by the way Salesforce functions. Please make sure none of these will be causing you any issues before you install the package.

Flows

The basis of this app runs on the following two Flows:

- **Dynamic User Icon - Daily Scheduled:** runs once a day (at 00:00) for ALL of the activity statuses, on Users who are set to “active” (inactive Users automatically show an icon based on the standard setting)
- **Dynamic User Icon - User IsChanged:** runs when there is a change to the User by an Admin, can set Status of Active (with the varying thresholds) or Invalid (Frozen and Locked is not accessible on change)

Status Updates on Login

Unfortunately, Salesforce does not provide any way to trigger the automation on the condition of a user logging in. As such, the status values can be updated only when an admin changes the User record or through the daily scheduled process. This means that some values might not be instantly up to date.

Frozen, Locked & Invalid

A User who is Frozen or Locked will not have their icon visible right away, as these values are only accessible through the scheduled Flow that runs once a day at midnight. Until this update, these Users will be shown with their latest activity value.

Installation

This app should be installed for “All users”, since non-admin users can also trigger the process when having their e-mail address changed as well as the information of the user activity can then be shared with all users.



Install Dynamic User Icon

By Tietoevry



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Essential Configurations Post-Installation

Run Flow Permission

The Flow can be triggered by normal Users when having their e-mail address changed in Sandboxes (from including ".invalid" to without). It is important to note that this is only possible if the User has the "Run Flow" permission. In case you do not have it set at the Profile level, a Permission Set called "Run Flow" has been included. This should be assigned to all Users, in order to ensure that they have the capability to trigger the Flow when necessary.

 Note: this step is not mandatory if you do not want to give your Users the ability to run Flows, but in that case the updates to the status values will occur only through the daily scheduled process.

Active Flows

As standard, the Flows within the package should be automatically active, but in order to ensure full functionality, it is better to double-check. The setting is found in Setup under Flows, by going to the two flows within the package and opening the "View Details and Versions" through the menu by clicking on the arrow.



SETUP

Flows

Flow Definitions

Dynamic User Icon - Flows 

2 items • Sorted by Flow Label • Filtered by All flow definitions - Flow Namespace • Updated a few seconds ago

Flow Label ↑

Dynamic User Icon - Daily Scheduled

Flow Description

Part of the Dynamic User Icon Package. Updates the Activity_Status__c field on the User object, based on time cri...

Active

✓

Dynamic User Icon - User IsChanged

Part of the Dynamic User Icon Package. Updates the Activity_Status__c field on the User object, based on t

View Details and Versions

Edit Details

Flow
Dynamic User Icon - Daily Scheduled
[Help for this Page](#)

[Back to List: Flows](#)

Flow Detail
Edit
Run

Flow Label	Dynamic User Icon - Daily Scheduled	Flow API Name	Dynamic_User_Icon_Daily_Scheduled
Description	Part of the Dynamic User Icon Package. Updates the Activity_Status__c field on the User object, based on time criteria set in Dynamic User Icon custom metadata. Runs daily at 0:00.	Namespace Prefix	TEIcon
Environments	Default	Type	Autolaunched Flow
Active Version		URL	/flow/TEIcon/Dynamic_User_Icon_Daily_Scheduled
Trigger	Schedule	Activated/Deactivated By	Patrik Justin Svitek, 9/8/2022, 11:18 AM
Modified By	Patrik Justin Svitek, 9/8/2022, 11:18 AM	Created By	Patrik Justin Svitek, 7/1/2022, 5:36 PM

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode	API Version for Running the Flow
Run Activate	Dynamic User Icon - Daily Scheduled	2	Part of the Dynamic User Icon Package. Updates the Activity_Status__c field on the User object, based on time criteria set in Dynamic User Icon custom metadata. Runs daily at 0:00.	Flow Builder	7/1/2022, 5:36 PM	Autolaunched Flow	Inactive	Default Mode	51.0

Application Customization Post-Installation

Activity Threshold

User Activity: the values need to be set in order to calculate the various activity levels, based on your wants (the calculation is based off the Last Login date, in days). The values can be adjusted in the given Custom Metadata Type.

- **High activity:** value should be the lowest, for users logging in most often (default set to 30)
- **Medium activity:** next tier, for users not logging in as often (default set to 60)
- **Low activity:** last tier, for users barely or not at all logging in (default set to 120)

Dynamic User Icon (Managed)

This Dynamic User Icon is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Dynamic User Icon Edit
Save
Save & New
Cancel

Information

Label

Activity Values

Namespace Prefix

TEIcon

Dynamic User Icon Name
Activity_Values

High Activity
30

Medium Activity
60

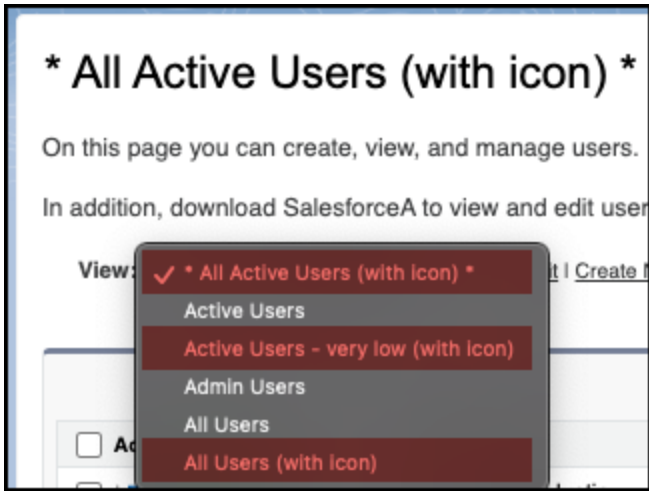
Low Activity
180

Save
Save & New
Cancel

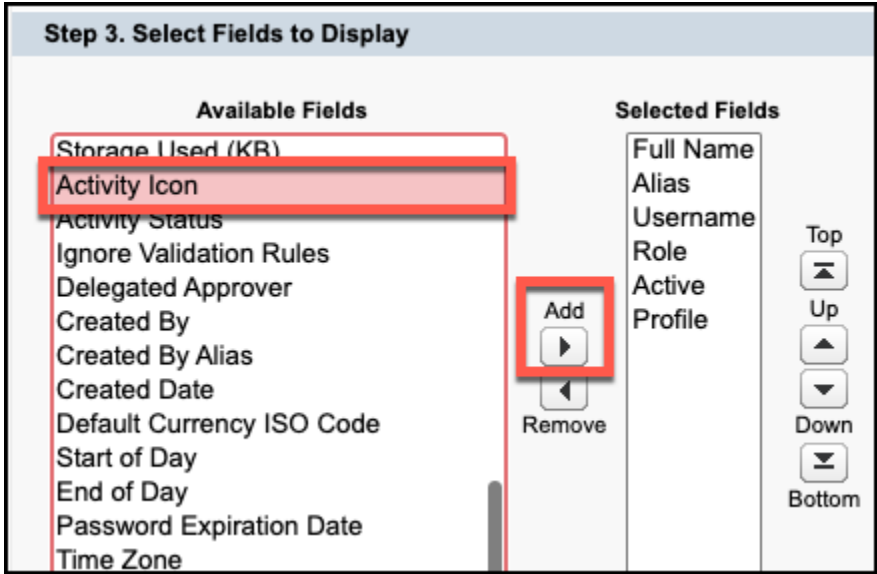
List View

As a standard, the app comes with three list views.

1. All Active Users (with icon)
2. All Users (with icon)
3. Low Activity Users (with icon)



You can, of course, also adjust your existing list views to include the icons by adding the field "Activity Icon" to the selected fields under the "Select Fields to Display" step.



Activity Icons

As standard, the app comes with the following set of icons:

User has “high” activity
User has been logged in within the last 30 days

User has “medium” activity
User has been logged in between the last 30 and 60 days

User has “low” activity
User has been logged in between the last 60 and 120 days

User has “very low” activity
User has been logged in less than 120 days

User has “no” activity
User is active, but has not logged in at all yet

User is active, but “invalid”
In a Sandbox, user record email address contains “.invalid”

User is Inactive
User record is not set to Active

User is Frozen
User record has been frozen by an admin

User is Locked
User record has been locked out due to incorrect password input

Uninstall Process

If you would like to uninstall the Package, please note that in the first step it is necessary to deactivate the two Flows included in the Package. This can be easily done through the Flow page or by clicking on the Flow Names when uninstalling.

SETUP

Installed Packages

Uninstalling a Package

[Help for this Page](#)

Unable to uninstall package

Problems

Component Type	Name	Problem
Flow Definition	Dynamic User Icon Daily Scheduled	The flow is still active. Deactivate the flow, and try again.
Flow Definition	Dynamic User Icon Login Subflow	The flow is still active. Deactivate the flow, and try again.
Flow Definition	Dynamic User Icon Activity Subflow	The flow is still active. Deactivate the flow, and try again.
Flow Definition	Dynamic User Icon User Logged In	The flow is still active. Deactivate the flow, and try again.
Flow Definition	Dynamic User Icon User IsChanged	The flow is still active. Deactivate the flow, and try again.

Version History

v.1.6

- Added 18 Translations on Custom Fields, Picklist Values, and Validation Error Messages

Translations

We added the translations for these 18 languages: English, German, Spanish, French, Italian, Japanese, Swedish, Korean, Chinese (Traditional), Chinese (Simplified), Portuguese (Brazil), Dutch, Danish, Thai, Finnish, Russian, Spanish (Mexico), Norwegian

The following components have been translated:

- User Object – Custom Fields
- User Object – Picklist Values

- Custom Meta Data – Custom Fields
- Custom Meta Data – Validation Error Message

Updates within the User Manual

- “Install for All Users” is now the recommended setting since all users should have access when the Activity Icon is shown in Reports & Dashboards.
- “Run Flows” Permission is needed for all users for seamless usage; therefore, the User manual was updated.
- Added the “Run Flow” Permission Set to the Package.
 - Or Info how to add the “Run Flows” Permission within the Profile.
 - Listed function limitations on Frozen, Locked, and Invalid Status

v.1.5

- Corrected wrong Icon URL link to static resource [Link im Doc]