Asset Relationship Matrix Release Notes

These release notes support the new Asset Relationship Matrix feature.

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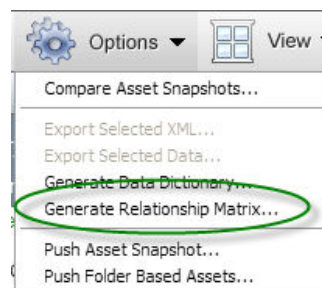
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1. Overview of Asset Relationship Matrix:

DreamFactory has added a new feature to SnapShot that enables you to view the various relationships within your Org through the Asset SnapShot Relationship Matrix. The Relationship Matrix allows you to easily find relationships between two Asset Types and then report on those relationships.
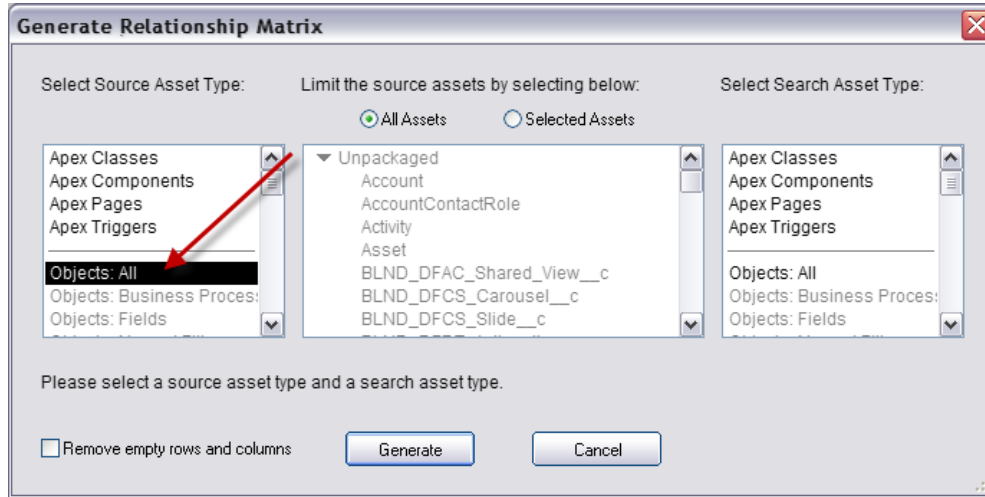
2. Instructions on How to Access the Asset Relationship Matrix:

To access the Relationship Matrix, follow the instructions below:

1. Go to the Asset SnapShot

2. Click on the Options menu and select the Generate Relationship Matrix command.
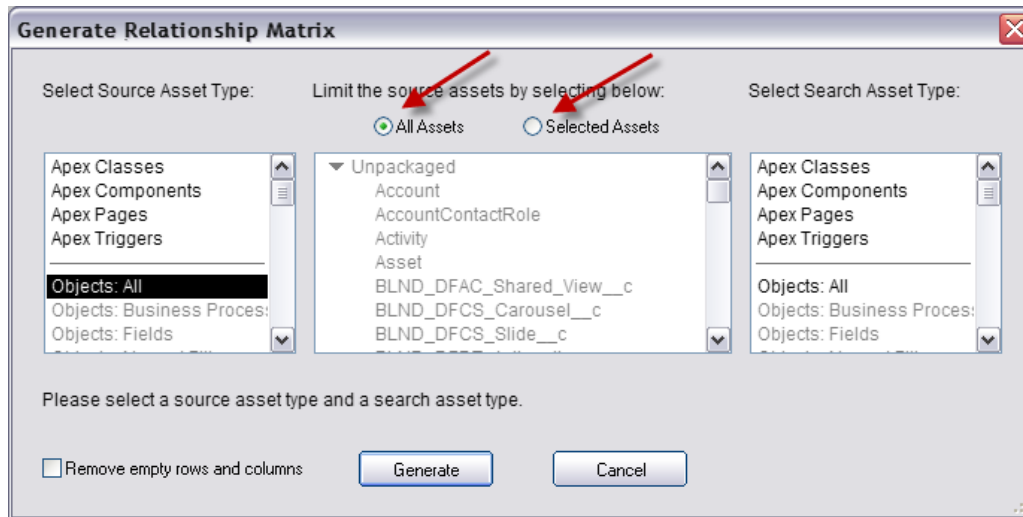
3. Once selected, the Generate Relationship Matrix dialog box will appear. First you want to select Source Asset Type that you want to search for.
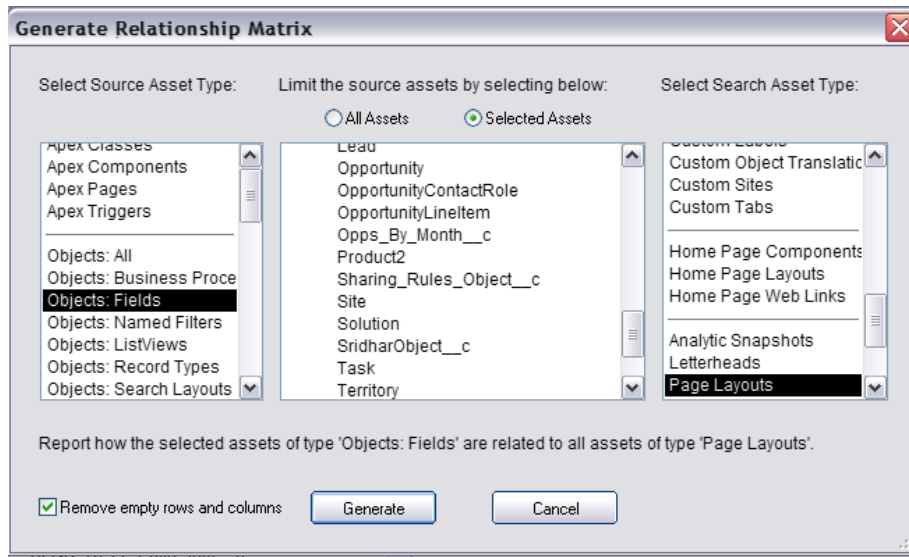

4. You have the ability to limit the source assets by selecting either "All assets" or "Selected Assets" for a subset of the assets of that type.

Note: *To access sub-elements of Objects and Profiles, select a subset of assets from the middle column either by clicking on the list or clicking the "Selected Assets" radio button. If subsets are not selected, it will strictly show the selected Source Asset Type.*
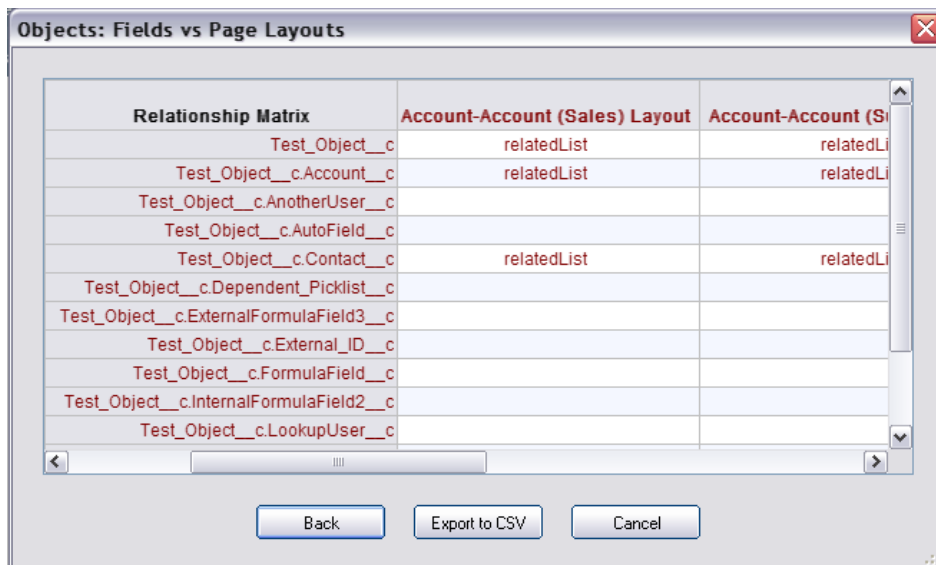
5. Then you want to select the Asset Type that will be searched through from the third column.

6. Once you have selected your desired criteria, simply click the Generate button.

Note: *The check box in the bottom left that states "Remove empty rows and columns", when checked, will remove columns and rows where no relationships are found in the matrix.*

7. Once you have clicked the Generate button, the dialog below will appear. The source (searched for) criteria that you selected will be listed in the left column of the dialog, while the searched criteria that you selected will be listed in the right column of the dialog.

In the screen shot below, the relationship matrix is displaying how Objects: Fields are related to Page Layouts. Within the matrix table, the Page Layouts are displayed on the top, while the objects and the fields are displayed on the left hand side. The results of the search are displayed in the middle of the table. If a relationship exists, both the Source Asset Type and the Search Asset Type will be highlighted in red with the results populated in the matrix table.

Objects: Fields vs Page Layouts

Relationship Matrix	Account-Account (Sales) Layout	Account-Account (S
Test_Object__c	relatedList	relatedLi
Test_Object__c.Account__c	relatedList	relatedLi
Test_Object__c.AnotherUser__c		
Test_Object__c.AutoField__c		
Test_Object__c.Contact__c	relatedList	relatedLi
Test_Object__c.Dependent_Picklist__c		
Test_Object__c.ExternalFormulaField3__c		
Test_Object__c.External_ID__c		
Test_Object__c.FormulaField__c		
Test_Object__c.InternalFormulaField2__c		
Test_Object__c.LookupUser__c		

[Back] [Export to CSV] [Cancel]

At the bottom of the matrix are the following three buttons:

Back – Selecting this option will bring you back to the initial relationship matrix configuration screen where you can search for more Asset relationships.

Export to CSV- Selecting this option allows you to export the matrix to a CSV file.

Cancel – Selecting this option will close the dialog box.

Below are some common examples of relationship searches.

1. Page Layouts by Fields - To see used/ unused fields.
2. Workflows by Fields - To see used/ unused fields.
3. Apex Triggers by Fields - To see used/ unused fields.
4. Apex Pages by Apex Components - To see used/ unused components in a Page.
5. Custom Sites by Apex Pages.
6. Custom Applications by Custom Tab
7. Home Page Layouts by Home Page Components.
8. Home Page Components by Home Page Web Links

3. Product Support:

The purpose of this document is to highlight the new Asset Relationship Matrix feature. Please direct all questions to DreamFactory Support at one of the following Support Options.

Live Chat – You can initiate a Live Chat with one of our Success Engineers by simply clicking on the Support Menu and selecting the Live Chat option.

Phone Support – You can contact our Support Engineers by phone at 1-877-577-3453 or by selecting the Phone Support option from the Support Menu.

Email Support – You can also email DreamFactory Support at support@dreamfactory.com.

Support Wiki – You can access additional information by accessing the DreamFactory Support Wiki online at http://dreamfactory.pbworks.com/SnapShot.

DreamFactory Support is available 5:00 AM until 5:00 PM PST (8:00 AM – 8:00PM EST) M-F.