

## Snapshot Feature Release Notes

These release notes provides a first look at phase 1 of the Snapshot Studio. The Snapshot Studio is a new tool that allows users to make edits and changes to Objects Fields and Profile Metadata directly inside Snapshot. These release notes also discuss some enhancements made to the Object Picklist Value Report.

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### 1. Overview of the Snapshot Studio

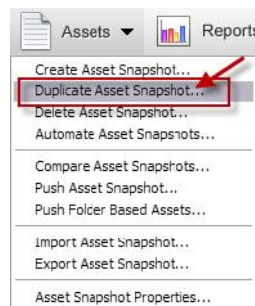
Snapshot has released the newest enhancement called the Snapshot Studio.



Located on the Asset Snapshot, the Snapshot Studio menu provides users with the ability to edit the following metadata:

- A. Edit Object Fields
- B. Edit Profiles

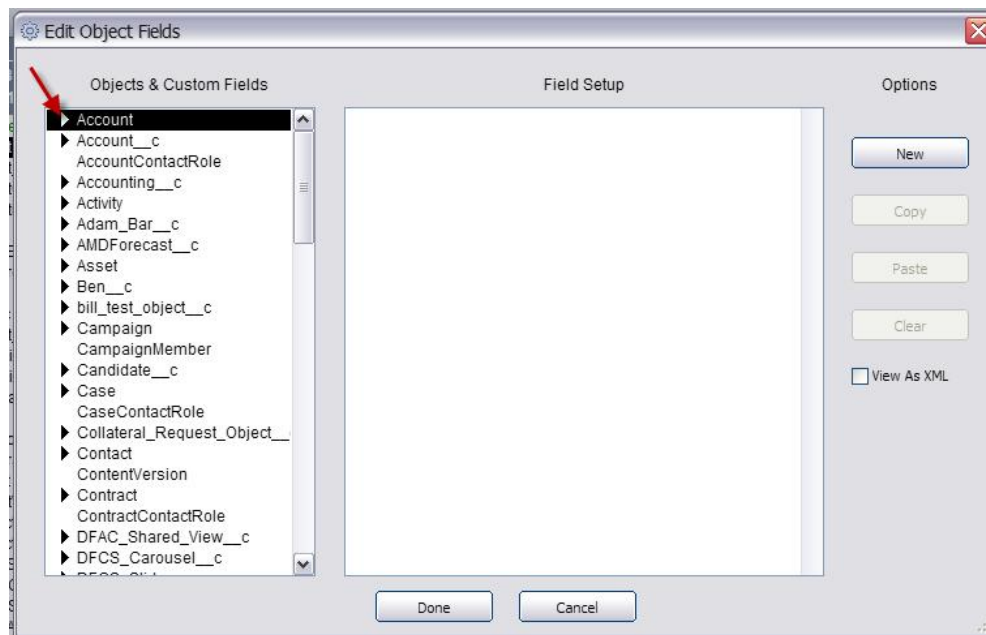
Prior to performing any edits, the asset snapshot allows users to either use an existing snapshot, or create a duplicate snapshot to make the edits to. The Duplicate Asset Snapshot option is located in the Asset Menu.



Duplicating an asset snapshot allows users to make edits to a copy of an existing snapshot without disturbing the original asset snapshot. Once the user selects the duplicate option, the new snapshot will have the word Copy added to the end of the naming convention. The name of the Snapshot is editable at this point as well.

This section provides additional details regarding each of options listed above.

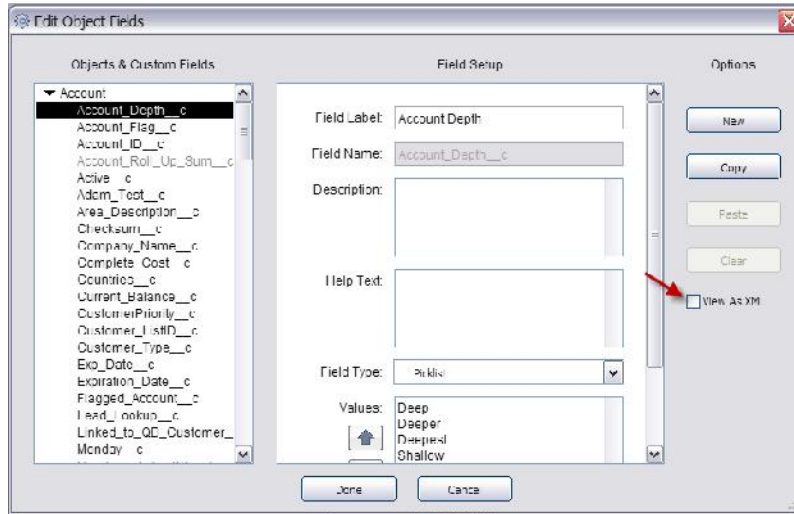
- A. Edit Object Fields** – The Objects Fields option will allow users to create, update, copy and paste individual fields on existing objects in the selected snapshot. Once selected, the Edit Object Fields dialog will appear (see screen shot below). Here users can select the field from the desired Object by clicking on the black arrow immediately to the left of the Object.



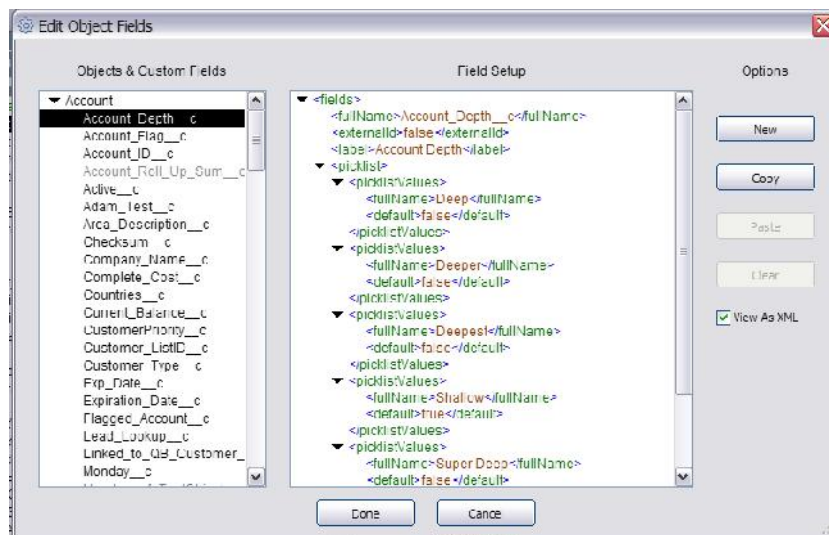
Once the arrow is clicked, a list of all of the fields in that Object will appear. To edit a particular field simply select the field from the box on the left. Once selected, the field attributes will appear in the box on the right.

Here users can do any of the following:

1. Edit the field attributes by adding a description or help text, or add picklist values
2. Users can modify the Field Type by clicking on the drop down menu next to Field Type
3. Users can also copy the field and paste it on a different Object
4. Lastly, users can click the New button on the right and create a completely new field on this object



Field attributes can be viewed in the current view, or if desired, users can also view the field attribute as XML by checking the box that says “View As XML” on the right side of the dialog. The “View As XML” option is currently read-only.



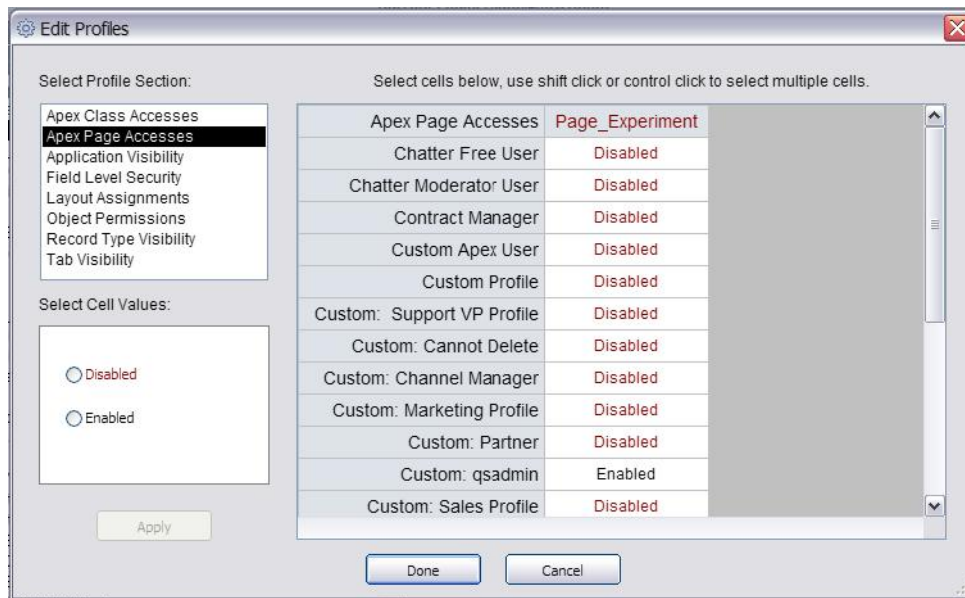
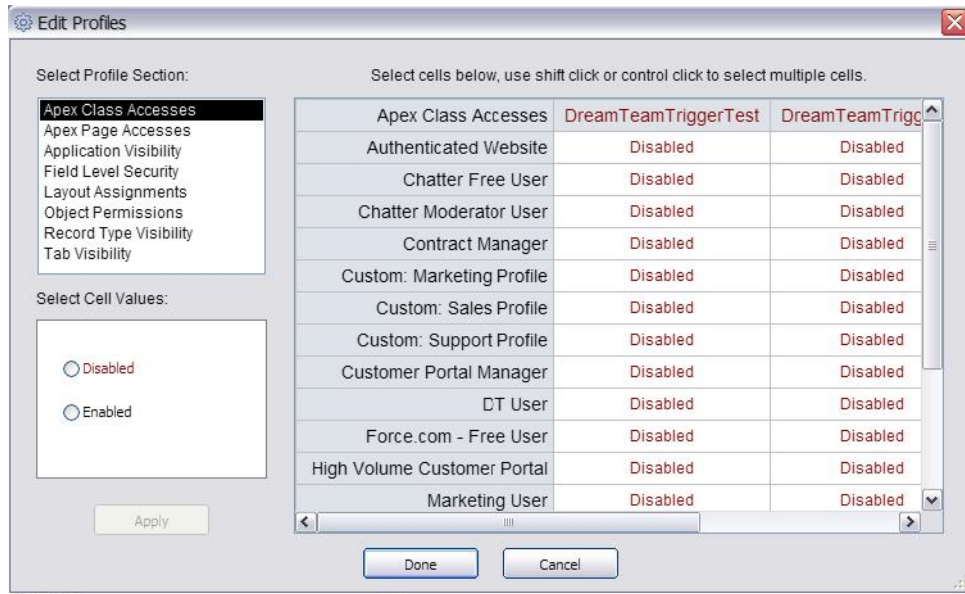
**B. Edit Profiles** – The Edit Profiles option allows users to edit profile metadata directly within Snapshot. Once selected, users can edit profile metadata from any of the following metadata options:

- Apex Class Accesses
- Apex Page Accesses
- Application Visibility
- Field Level Security
- Layout Assignments
- Object Permissions
- Record Type Visibility
- Tab Visibility

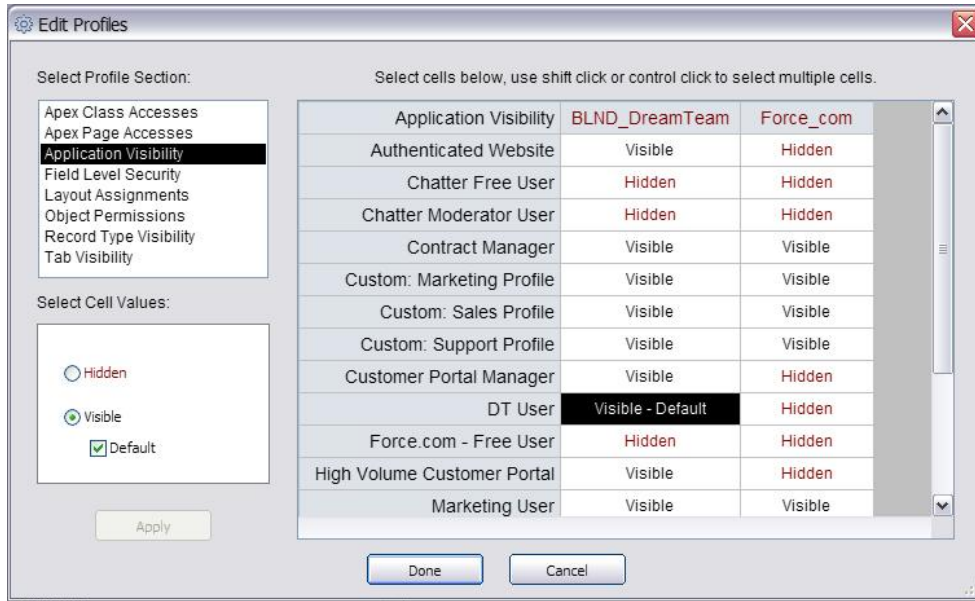


Below is a description of the editing capabilities for each of the Profile Metadata options listed above.

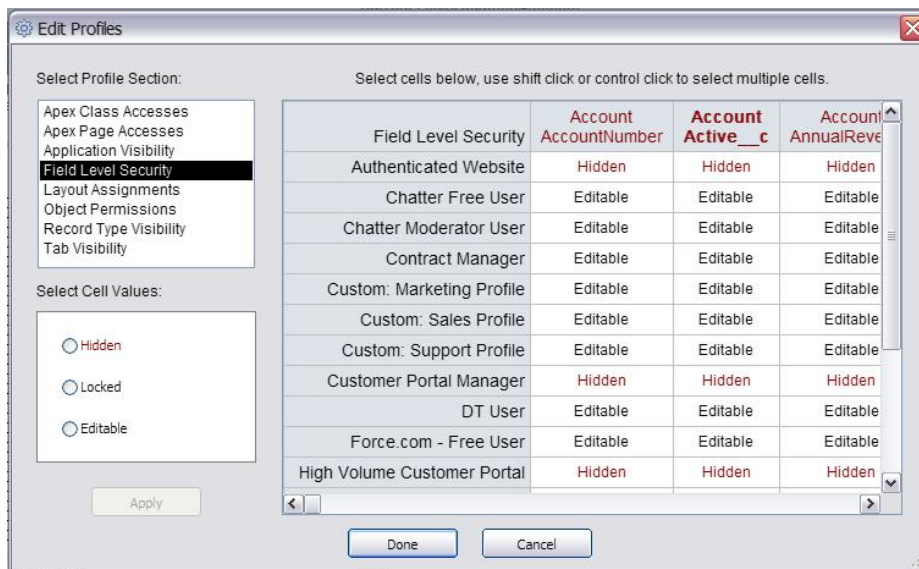
**Apex Class & Apex Page Accesses** – For both Apex Class and Apex Page Accessed, users will be able to either Disable or Enable the listed Apex Class or Page.



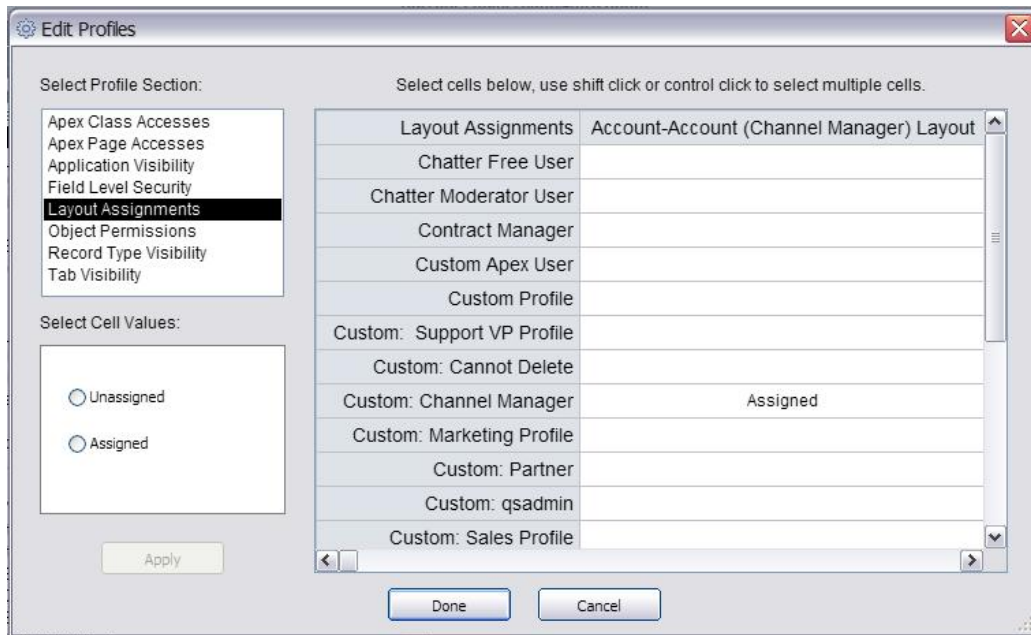
**Application Visibility** – For Application Visibility, users will be able to edit which Applications are hidden or visible for all profiles. Users can also set the value as a default if they want to. This matrix is only for Custom Applications.



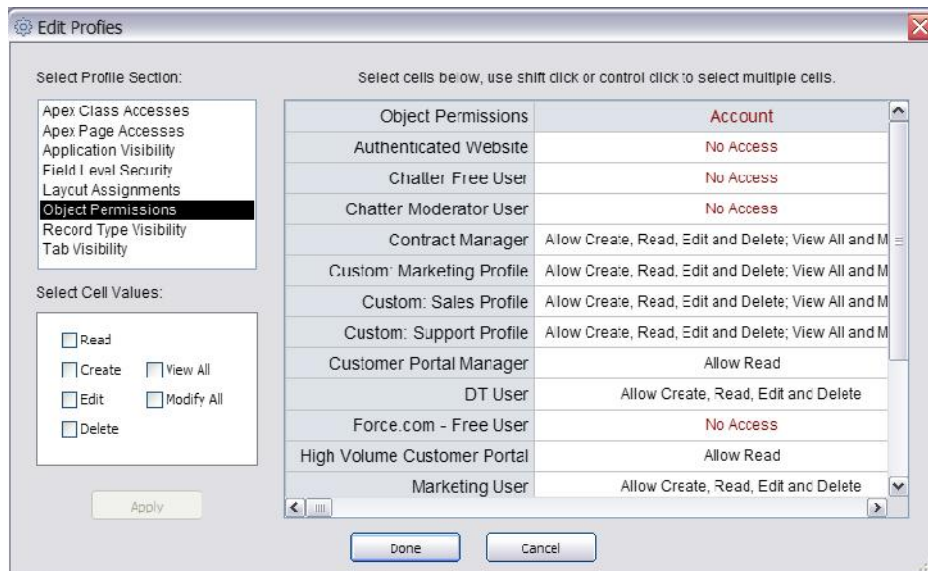
**Field Level Security** – For Field Level Security, users will be able to edit all fields and dictate whether they are hidden, locked or editable.



**Layout Assignments** – For Layout Assignments, users will be able to edit the existing layout assignments by assigning or un-assigning profiles to certain page layouts.



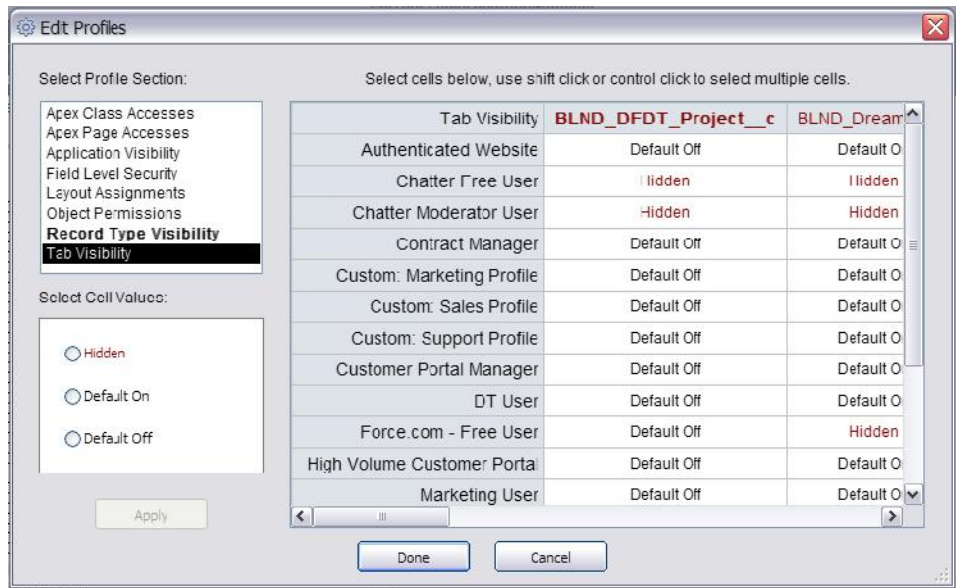
**Object Permissions** – For Object Permissions, users will be able to modify the CRUD rights for selected profiles. Users can select from Read, Edit, Create, Delete, View All and Modify All.



**Record Type Visibility** – For Record Type Visibility, users will be able to edit whether a record type is hidden or visible for selected profiles. Users can also dictate a default value if they want to.

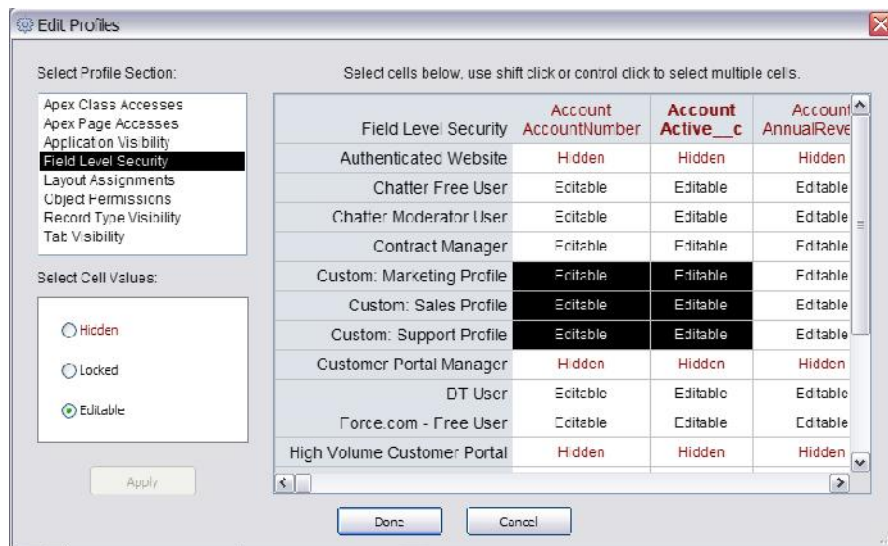


**Tab Visibility** – For Tab Visibility, users will be able to edit whether the tab is Hidden, Default On or Default Off for selected profiles.

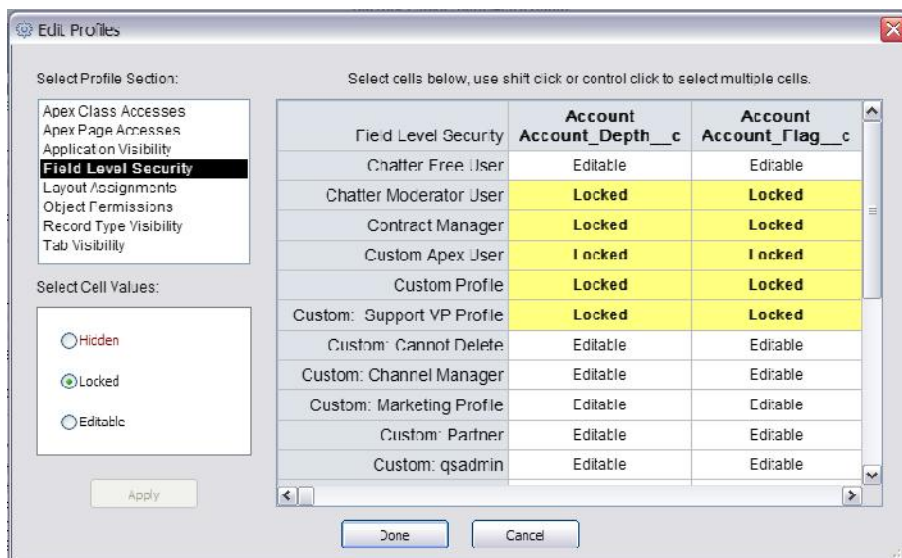




To make a change, the user must select the profiles and values that they want to change. The selected values will be highlighted in black. Selecting the row or column header selects the whole row or column.

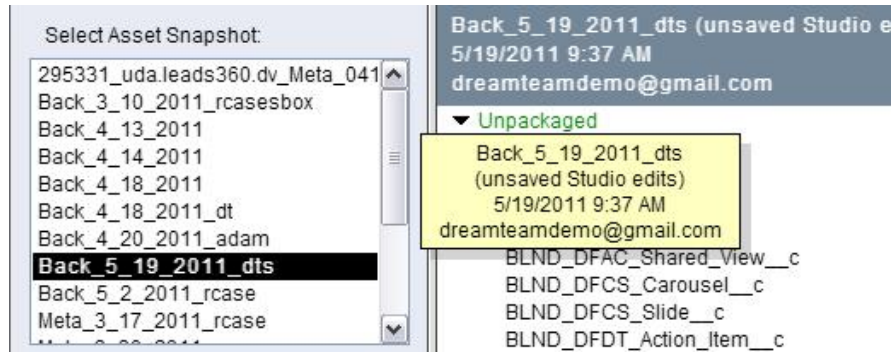


Once a user makes a change, they must click the Apply button to apply the temporary changes. The metadata that was changed will be highlighted.

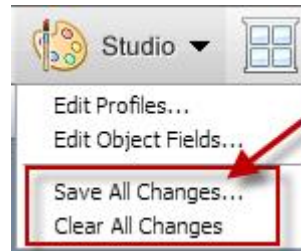


Once the user is finished making all edits, all user has to do is simply click the 'Done' button which will write the changes back to the snapshot that they are working with. Selecting the 'Cancel' button throws all current changes in the dialog away.

If an edit has been made, the snapshot that the changes were made on will be bolded in the Select Asset Snapshot box. If the user hovers over the selected snapshot, they can see that there are unsaved Studio edits in the yellow dialog box. These edits can be used for deployment but are not officially saved to the snapshot.



All changes made in either the Edit Object Fields or the Edit Profiles options are temporarily made to the selected Snapshot. The user has the ability to either save the changes made or clear all changes.



To save these changes, the user must click on the Studio Menu and select Save All Changes before exiting Snapshot. Users can also clear all changes from this menu as well.

## 2. Overview of the Enhancements made to the Object Picklist Value Report

Enhancements have been made to the Object Picklist Usage Report. Now, users can choose to see All Values, Values with No Usage or Values Not In Picklist.

Object Picklist Value Usage Report for adamss@df.com

Choose objects, then select 'Generate':

- All Objects
- Standard Objects
- Custom Objects
- Choose From List

Display:  All Values  Values With No Usage  Values Not In Picklist

Name	Value	Count	Percentage
Type			
	Empty	233	50%
	Prospect	50	11%
	Customer - Direct	14	3%
	Customer - Channel	8	2%
	Channel Partner / Reseller	0	0%
	Installation Partner	0	0%
	Technology Partner	0	0%
	Other	1	0%
	Former Customer	15	3%
	Customer	140	30%
	Partner	4	1%
	Integrator	1	0%
	Partner - Reseller	3	1%
	Partner - AppExchange	1	0%

Generate Export To CSV Cancel \*\* denotes default value

These three options are all color coded with all values that are being used displayed in black, values with no usage displayed in red and values no longer in the picklist displayed in orange. Below are screen shots of the two new options.

**Red** – Values displayed in red indicate values that are not being used.

Object Picklist Value Usage Report for adamss@df.com

Choose objects, then select 'Generate':

- All Objects
- Standard Objects
- Custom Objects
- Choose From List

Display:  All Values  Values With No Usage  Values Not In Picklist

Name	Value	Count	Percentage
Type			
	North America	0	0%
	South America	0	0%
	Caribbean	0	0%
	Western Africa	0	0%
	Sahara	0	0%
	Mediterranean	0	0%
	South Africa	0	0%
	Northeastern Africa	0	0%
	Channel Partner / Reseller	0	0%
	Installation Partner	0	0%
	Technology Partner	0	0%
UpsellOpportunity__c			
	Absolutely not	0	0%
	I can't think why I should	0	0%

Generate Export To CSV Cancel \*\* denotes default value

**Orange** – Values displayed in orange indicate values that are no longer in the picklist.

Object Picklist Value Usage Report for adamss@df.com

Choose objects, then select 'Generate':

Display:  All Values  Values With No Usage  Values Not In Picklist

All Objects  
 Standard Objects  
 Custom Objects  
 Choose From List

Account  
AccountContactRole  
AccountTeamMember  
AccountTerritoryAssignmentRule  
AccountTerritoryAssignmentRuleItem  
Account\_Custom\_Settings\_\_c  
Adam\_Bar\_\_c  
AdditionalNumber  
AggregateResult  
ApexClass  
ApexClassIdentifier  
ApexClassIdentifierRelationship  
ApexComponent  
ApexLog  
ApexPage  
ApexTrigger

Name	Value	Count	Percentage
	Web Services	1	0%
Multi_select_Picklist__c			
Ownership			
Rating			
Region__c			
SLA__c			
Subregions__c			
Type	Former Customer	15	3%
	Customer	140	30%
	Partner	4	1%
	Integrator	1	0%
	Partner - Reseller	3	1%
	Partner - AppExchange	1	0%
UpsellOpportunity__c			

Generate Export To CSV Cancel \*\* denotes default value

### **3. Product Support:**

The purpose of this document is to highlight the new Snapshot Studio which will be released soon as well as the enhancements made to the Object Picklist Usage Report. 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](mailto: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.