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.

Contents:

- 1. Overview of Snapshot Studio
- 2. Overview of the Enhancements made to the Object Picklist Value Report
- 3. Product Support

1. Overview of the Snapshot Studio

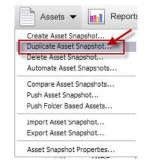
Snapshot has released the newest enhancement called the Snapshot Studio.



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.

Objects & Custom Fields	Field Setup	Options
Account		
Account_c		New
AccountContactRole		
Accounting_c		
Adam_Barc		Сору
Addin_Bar_c		
Asset		Paste
Ben c		rusic
bill_test_objectc		
Campaign		Clear
CampaignMember		
Candidatec		View As XM
Case		
CaseContactRole		
Collateral_Request_Object		
Contact ContentVersion		
Contract		
ContractContactRole		
DFAC_Shared_View_c		
DFCS_Carouselc		

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

Objects & Custom Fields		Field Setup	Options
Account	Field Label:	Account Depth	 Ne#
Account_IDc Account_Rol_Up_Sumc Active_c	Field Name:	Account_Depthc	Спру
Adam_Test_c Area_Description_c Checksum c	Description:		Feste
Company_Namec Complete Cost c Countries c	Lielp Text		 Clear
Current_Balancec CustomerPriorityc Customer_ListIDc	TIBID Text:		VIEW AS X
Customer_Typec Exp_Datoc Expiration_Datec	Field Type:	Pit klisi	
Flagged_Accountc Lead_Lookupc Linked_to_QD_Customer_	Values:	Deep Deeper Deepesi	

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.

Objects & Custom Fields	Field Selup	Options
Account Deth C Account Plag_C Account_Plag_C Account_Plag_C Account_Rlag_C Account_Rlag_C Account_Rlag_C Acdve_c Adam_lest_C Adam_lest_C Complete_Cost_c Complete_Cost_c Complete_Cost_c Countert_Balance_c CustomerHpony_c CustomerThpre c Frg_Date_c Expiration_Date_c Flagged_Account_c Lanked_tola_Customer_ Monday_c Monday_c	 <fiilds> <fiilds> <fiilds> <fiilds> </fiilds></fiilds></fiilds></fiilds>	New Cooy Paste Liear View As MN

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

Select Profile Section:	Select cells below, use shi	ift click or control click	to select multip	le cells.	
Apex Class Accesses Apex Page Accesses Application Visibility	Field Level Security	Account AccountNumber	Account Activec	Account AnnualReve	
Field Level Security	Authenticated Website	Hidden	Hidden	Hidden	
Layout Assignments Object Permissions	Chatter Free User	Editable	Editable	Editable	
Record Type Visibility	Chatter Moderator User	Editable	Editable	Editable	
Tab Visibility	Contract Manager	Editable	Editable	Editable	
Select Cell Values:	Custom: Marketing Profile	Editable	Editable	Editable	
	Custom: Sales Profile	Editable	Editable	Editable	
Hidden	Custom: Support Profile	Editable	Editable	Editable	L
OLocked	Customer Portal Manager	Hidden	Hidden	Hidden	
	DT User	Editable	Editable	Editable	
Editable	Force.com - Free User	Editable	Editable	Editable	
	High Volume Customer Portal	Hidden	Hidden	Hidden	~
Apply	<			>	Ť

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.

Select Profile Section:	Select cells below, use shi	ift click or control click to select	multiple cells.	
Apex Class Accesses Apex Page Accesses	Apex Class Accesses	DreamTeamTriggerTest	DreamTeamTrig	c -
Application Visibility	Authenticated Website	Disabled	Disabled	
Field Level Security Lavout Assignments	Chatter Free User	Disabled	Disabled	
Object Permissions	Chatter Moderator User	Disabled	Disabled	
Record Type Visibility Tab Visibilitv	Contract Manager	Disabled	Disabled	-
	Custom: Marketing Profile	Disabled	Disabled	
elect Cell Values:	Custom: Sales Profile	Disabled	Disabled	
	Custom: Support Profile	Disabled	Disabled	
O Disabled	Customer Portal Manager	Disabled	Disabled	L
C Enabled	DT User	Disabled	Disabled	
N. There is a second second	Force.com - Free User	Disabled	Disabled	
	High Volume Customer Portal	Disabled	Disabled	
	Marketing User	Disabled	Disabled	
Apply	<		>	1

Select Profile Section:	Select cells below, use s	hift click or control click to select n	nultiple cells.
Apex Class Accesses	Apex Page Accesses	Page_Experiment	
Apex Page Accesses Application Visibility	Chatter Free User	Disabled	
Field Level Security Layout Assignments	Chatter Moderator User	Disabled	
Object Permissions	Contract Manager	Disabled	
Record Type Visibility Tab Visibility	Custom Apex User	Disabled	
	Custom Profile	Disabled	
Select Cell Values:	Custom: Support VP Profile	Disabled	
	Custom: Cannot Delete	Disabled	
 Disabled 	Custom: Channel Manager	Disabled	
○ Enabled	Custom: Marketing Profile	Disabled	
	Custom: Partner	Disabled	
	Custom: qsadmin	Enabled	
Apply	Custom: Sales Profile	Disabled	•

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.

Select Profile Section:	Select cells below, use shi	ft click or control click to s	elect multiple cells.	
Apex Class Accesses Apex Page Accesses	Application Visibility	BLND_DreamTeam	Force_com	^
Application Visibility	Authenticated Website	Visible	Hidden	
Field Level Security Layout Assignments	Chatter Free User	Hidden	Hidden	
Object Permissions	Chatter Moderator User	Hidden	Hidden	
Record Type Visibility Tab Visibility	Contract Manager	Visible	Visible	=
	Custom: Marketing Profile	Visible	Visible	
Select Cell Values:	Custom: Sales Profile	Visible	Visible	
OHidden	Custom: Support Profile	Visible	Visible	
	Customer Portal Manager	Visible	Hidden	_
() Visible	DT User	Visible - Default	Hidden	
Default	Force.com - Free User	Hidden	Hidden	
	High Volume Customer Portal	Visible	Hidden	
Apply	Marketing User	Visible	Visible	~

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

Select Profile Section:	Select cells below, use shi	ift click or control click	to select multip	le cells.
Apex Class Accesses Apex Page Accesses Application Visibility	Field Level Security	Account AccountNumber	Account Activec	Account AnnualReve
Field Level Security	Authenticated Website	Hidden	Hidden	Hidden
Layout Assignments Object Permissions	Chatter Free User	Editable	Editable	Editable
Record Type Visibility	Chatter Moderator User	Editable	Editable	Editable
Tab Visibility	Contract Manager	Editable	Editable	Editable
Select Cell Values:	Custom: Marketing Profile	Editable	Editable	Editable
	Custom: Sales Profile	Editable	Editable	Editable
◯ Hidden	Custom: Support Profile	Editable	Editable	Editable
○ Locked	Customer Portal Manager	Hidden	Hidden	Hidden
0	DT User	Editable	Editable	Editable
○ Editable	Force.com - Free User	Editable	Editable	Editable
	High Volume Customer Portal	Hidden	Hidden	Hidden
Apply			2.	>

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.

Select Profile Section:	Select cells below, use s	hift click or control click to select multiple cells.	
Apex Class Accesses	Layout Assignments	Account-Account (Channel Manager) Layout	^
Apex Page Accesses Application Visibility	Chatter Free User		
Field Level Security Layout Assignments	Chatter Moderator User		
Object Permissions	Contract Manager		1
Record Type Visibility Tab Visibility	Custom Apex User		
	Custom Profile		
Select Cell Values:	Custom: Support VP Profile		
	Custom: Cannot Delete		
O Unassigned	Custom: Channel Manager	Assigned	
○ Assigned	Custom: Marketing Profile		
	Custom: Partner		
	Custom: qsadmin		
	Custom: Sales Profile		~
Apply		>	1

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.

Select Profile Section:	Select cells below, use shift click or control click to select multiple cells.				
Apex Class Accesses	Object Permissions	Account			
Apex Page Accesses Application Visibility	Authenticated Website	No Access			
Field Level Security Layout Assignments	Challer Free User	No Access			
Object Permissions	Chatter Moderator User	No Access			
Record Type Visibility Tab Visibility	Contract Manager	Alow Create, Read, Edit and Delete; View All and M			
Tab visionity	Custom Marketing Profile	Alow Create, Read, Edit and Delete; View All and M			
Select Cell Values:	Custom: Sales Profile	Allow Create, Read, Edit and Delete; View All and M			
Read	Custom: Support Profile	Allow Create, Read, Edit and Delete; View All and M			
Create View All	Customer Portal Manager	Allow Read			
Edit Modify All	DT User	Allow Create, Read, Edit and Delete			
Delete	Force.com - Free User	No Access			
	High Volume Customer Portal	Allow Read			
Apply	Marketing User	Allow Create, Read, Edit and Delete			

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.

Select Profile Section:	Select cells below, use shi	ift click or control click to select multiple	cells.
Apex Class Accesses Apex Page Accesses Application Visibility	Record Type Visibility	Idea InternalideasIdeaRecordType	^
Field Level Security	Authenticated Website	Hidden	
Layout Assignments Object Permissions	Chatter Free User	Hidden	
Record Type Visibility	Chatter Moderator User	Hidden	
Tab Visibility	Contract Manager	Hidden	
Select Cell Values:	Custom: Marketing Profile	Hidden	
	Custom: Sales Profile	Hidden	
○ Hidden	Custom: Support Profile	Hidden	
0	Customer Portal Manager	Visible - Default	
O Visible	DT User	Hidden	
Default	Force.com - Free User	Hidden	
	High Volume Customer Portal	Hidden	~
Apply			~

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

Select Profile Section:	Select cells below, use shi	ft click or control click to select mult	iple cells.
Apex Class Accesses Apex Page Accesses	Tab Visibility	BLND_DFDT_Project_c	BLND_Dream
Application Visibility	Authenticated Website	Default Off	Default O
Field Level Security Lavout Assignments	Chatter Free User	lidden	llidden
Object Permissions	Chatter Moderator User	Hidden	Hidden
Record Type Visibility Tab Visibility	Contract Manager	Default Off	Default O
rearranty	Custom: Marketing Profile	Default Off	Default O
Select Cell Values:	Custom: Sales Profile	Default Off	Default O
Out	Custom: Support Profile	Default Off	Default O
Hidden	Customer Portal Manager	Default Off	Default O
O Default On	DT User	Default Off	Default O
O Default Off	Force.com - Free User	Default Off	Hidden
	High Volume Customer Porta	Default Off	Default O
	Marketing User	Default Off	Default O
Apply	< III		>

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.

Select Profile Section:	Select cells below, use shi	ft click or control click	to select multip	le cel s.	
Apex Class Accesses Apex Page Accesses Applicaton Vis bility	Field Level Security	Account AccountNumber	Account Activec	Account AnnualReve	
Field Level Security Layout Assignments Object Permissions Record Type Visibility Tab Visibility	Authenticated Website	Hidden	Hidden	Hidden	
	Chatter Free User	Editable	Editable	Edtable	
	Chatter Moderator User	Ecitable	Editable	Edtable	=
	Contract Manager	Editable	Editable	Fdtable	
Select Cell Values:	Custom: Marketing Profile	Ecitable	Editable	Fditable	
	Custom: Sales Profile	Ecitable	Editable	Editable	
O Hidden	Custom: Support Profile	Ecitable	Editable	Edtable	_
CLocked	Customer Portal Manager	Hiddon	Hiddon	Hiddon	
Editable	DT User	Ecitable	Editable	Editable	
	Force.com - Free User	Editable	Editable	Edtable	
	High Volume Customer Portal	Hidden	Hidden	Hidden	v
Apply	3			>	bitt

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.

Select Profile Section:	Select cells below, use s	hift click or control click to se	lect multiple cells.	
Apex Class Accesses Apex Page Accesses Application Visibility	Field Level Securty	Account Account_Depthc	Account Account_Flag	c ^
Field Level Security	Chatter Free User	Editable	Editable	
Layout Assignments Object Fermissions	Chatter Moderator User	Locked	Locked	
Record Type Visibility Tab Visibility	Contract Manager	Locked	Locked	=
	Custom Apex User	Locked	l ocked	
Select Cell Values:	Custom Profile	Locked	Locked	
	Custom: Support VP Profile	Locked	Locked	
Hidden	Custom: Cannot Delete	Editable	Editable	
Locked	Custom: Channel Manager	Editable	Editable	
CEditable	Custom: Marketing Profile	Editable	Editable	
	Custom: Partner	Editable	Editable	
	Custom: qsadmin	Editable	Editable	~
Apply	<			>

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.

ack_4_18_2011 ack_4_18_2011_dt	1	Back_5_19_2011_dts (unsaved Studio e 5/19/2011 9:37 AM dreamteamdemo@gmail.com			
		 Unpackaged 			
Back_4_14_2011	=	Back_5_19_2011_dts			
Back_4_18_2011		(unsaved Studio edits)			
Back_4_18_2011_dt		5/19/2011 9:37 AM			
Back_4_20_2011_adam		dreamteamdemo@gmail.com			
Back_5_19_2011_dts		BLND_DFAC_Shared_Viewc			
Back 5 2 2011 rcase		BLND_DFCS_Carouselc			
Meta 3 17 2011 rcase	~	BLND_DFCS_Slidec			
		BLND_DFDT_Action_Itemc			

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.

100	Stud	io 🔻	E	
	t Profile t Objec		s	/
Sav	ve All C	hange	s	

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.

Choose objects, then select 'Generate':	Display: 💿 All Values	○ Values With No Usage ○ V	alues Not Ir	1 Picklist	
⊖ All Objects	Name	Value	Count	Percentage	~
🔾 Standard Objects	Туре	1			
O Custom Objects		Empty	233	50%	
Choose From List		Prospect	50	11%	
-	-	Customer - Direct	14	3%	
Account AccountContactRole		Customer - Channel	8	2%	
AccountTeamMember		Channel Partner / Reseller	0	0%	
AccountTerritoryAssignmentRule		Installation Partner	0	0%	
AccountTerritoryAssignmentRuleItem		Technology Partner	0	0%	
Account_Custom_Settingsc Adam_Barc AdditionalNumber AggregateResult ApexClass		Other	1	0%	
		Former Customer	15	3%	
		Customer	140	30%	
		Partner	4	1%	
ApexClassIdentifier ApexClassIdentifierRelationship		Integrator	1	0%	1
ApexComponent		Partner - Reseller	3	1%	
ApexLog		Partner - AppExchange	1	0%	~
ApexPage					

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 organge. Below are screen shots of the two new options.

Choose objects, then select 'Generate':		Display: 🔿 All Values	O Values With No Usage O V	alues Not Ir	I FILMER	
○ All Objects		Name	Value	Count	Percentage	^
◯ Standard Objects			North America	0	0%	
O Custom Objects			South America	0	0%	
Choose From List			Carribean	0	0%	
Account	~		Western Africa	0	0%	
AccountContactRole	-		Sahara	0	0%	
AccountTeamMember			Mediterrenean	0	0%	
AccountTerritoryAssignmentRule			South Africa	0	0%	
AccountTerritoryAssignmentRuleItem Account_Custom_Settingsc			Northeastern Africa	0	0%	
Adam_Barc		Ту	pe			
AdditionalNumber			Channel Partner / Reseller	0	0%	
AggregateResult ApexClass			Installation Partner	0	0%	ſ
ApexClassIdentifier			Technology Partner	0	0%	State: 100
ApexClassIdentifierRelationship		UpsellOpportunity_c				1
ApexComponent			Absolutely not	0	0%	
ApexLog ApexPage	~		I can't think why I should	0	0%	~

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

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

Choose objects, then select 'Generate':	Display: O All Values (Values With No Usage 💿	Values Not Ir		
○ All Objects	Name	Value	Count	Percentage	1
◯ Standard Objects		Web Services	1	0%	
O Custom Objects	Multi_select_Picklistc				
⊙ Choose From List	Ownership				1
Account	Rating				1
AccountContactRole	Region_c				
AccountTeamMember	SLA_c				
AccountTerritoryAssignmentRule	Subregionsc				
AccountTerritoryAssignmentRuleItem Account Custom Settings c	Туре				
Adam_Bar_c	_	Former Customer	15	3%	
AdditionalNumber		Customer	140	30%	
AggregateResult		Partner	4	1%	11
ApexClass ApexClassIdentifier		Integrator	1	0%	
ApexClassIdentifierRelationship		Partner - Reseller	3	1%	
ApexComponent		Partner - AppExchange	1	0%	
ApexLog ApexPage	UpsellOpportunity_c		2		~

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.

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

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