# SnapShot Feature Release Notes

These release notes support the new Snapshot Administrative Permissions. The SnapShot Administrative Permissions gives a system administrator the ability to assign push permissions of the various types of assets found in a Salesforce org to each administrator in that org.

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### 1. Overview of the Snapshot Administrative Permissions

The SnapShot Administrative Permissions gives a system administrator the ability to assign push to each administrator in each Salesforce org.

Once setup, these permissions are applied to each user when performing pushes via 'Asset Push', 'Folder Based Asset Push', 'Profile Push' and 'Object Push' operations. If pushes are attempted with asset types that the user does not have permissions for, a SnapShot administrative audit log entry is created detailing the attempt. For any existing Snapshot user who does not have the Administrative Permissions setup in their Org, you can easily add this feature by following the steps below:

- 1. Click on the View Menu
- 2. Once clicked, the following dialog will appear.

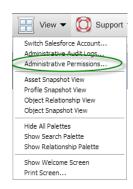
Administrative Permissions
Administrative permission control can be installed in any salesforce org. Once installed, permissions for SnapShot features, like push, can be granted or denied for each user.
The current org is: leetester@dreamfactory.com
The parent 'SnapShot Push' object has NOT been installed.
The child 'SnapShot Item' object has NOT been installed.
The 'SnapShot Permissions' object has NOT been installed.
Administrative audit logs and permission controls are NOT enabled.
Click here to launch our package that installs the audit logs and permission controls
OK Cancel

3. Click on the blue hyperlink at the bottom to install the private package. Clicking on this hyperlink will install the private package containing the Administrative audit logs and permission controls.

#### How to use the Snapshot Administrative Permissions

To access the Snapshot Administrative Permissions, simply follow the steps below:

1. Click on the View Menu and select Administrative Permissions



2. Once selected, the Administrative Permissions dialog box will appear. Here you will see a list of the Administrators in your Salesforce Org on the left and a list of Assets on the right hand side.

Administrators in your salesforce Org:	Assign push permissions for the selected admir	nistrator
Roger Case (rcase@org1.com)	Select All Select None	
Sathya Sridhar (rcasesridhar@dreamfactory.com) Ingrid Madden (channel@yahoo.com) Tom Zales (tomzales@dreamfactory.com) Bill Appleton (billa@org1.com) Susan Madden (order@org1.com)	<ul> <li>✓ Apex Classes</li> <li>✓ Apex Components</li> <li>✓ Apex Pages</li> <li>✓ Apex Triggers</li> </ul>	
Orynthia Capobianco (resource1@org1.com)	Objects Details	
Mike Gaffney (mgaffney@countrywide.com) Charles Medici (cmedici@yahoo.com)	Profiles	
Todd Appleton (todd@org1.com) Matt Stoli (stoli@yahoo.com)	Custom Applications	
Michael Gaffney (mgaffney@sempra.com)	Custom Labels	~

3. Simply select the desired administrator from the box on the left and then select the metadata you want to provide push access to from the box on the right. The user list at left contains all users that have 'Modify All Data', 'Customize Application', and 'API Enabled' selected in their profile assignment. Hovering over the individual Administrator will show you what level of permissions has been granted for that Admin. In addition, the color coded status icon left of each user's name indicates the current permission level.

Red means the user is currently denied from pushing any assets via SnapShot interfaces. Yellow indicates the user is permitted to push some but not all asset types. Green indicates the user is permitted to push all asset types.

Selecting one of the users in the list fills the asset type list at right with the current permissions granted. Modifications can be made to each user's list of permissions granted. Clicking the 'Save' button saves all modifications to all users in the list to the Salesforce org.

4. To select permissions simply check the checkbox to the left of the Asset name and then click the save button. Admins can click on the "Select All" and "Select None" buttons as well.

Administrators in your salesforce Org:	Assign push permissions for the selected adminis	strator.
Roger Case (rcase@org1.com)	Select All Select None	
Sathya Sridhar (rcasesridhar@dreamfactory.com)		
🔴 Ingrid Madden (channel@yahoo.com)	Apex Classes	^
Tom Zales (tomzales@dreamfactory.com)	Apex Components	-
😔 Bill Appleton (billa@org1.com)	Apex Pages Apex Triggers	-
Susan Madden (order@org1.com)	Apex higgers	
🔴 Cynthia Capobianco (resource1@org1.com)	Objects	
Mike Gaffney (mgaffney@countrywide.com)		<u></u>
🔴 Charles Medici (cmedici@yahoo.com)	Profiles	
Todd Appleton (todd@org1.com)		_
Matt Stoli (stoli@yahoo.com)	Custom Applications	
Michael Gaffney (mgaffney@sempra.com)	Custom Labels	~

For the Object asset type, the admin can select the individual object assets as well. When selecting Objects, simply click on the Details option and the Select Allowed Objects dialog box will appear. Here you can choose all, none or select multiple objects that you want to provide push permission for.

Select Allowed Objects	×
Select the allowed assets for push.	
Select All Select None	
All New Objects	
Account AccountContactRole Accounting_c Activity Adam_Bar_c Adam_Bar_c Asset Ben_c	~
Close	

The All New Objects check box on top of the Object dialog allows the admin to assign/deny a user permissions to push objects that do not exist on the destination. This setting is checked in the Object Snapshot and the Asset Snapshot push dialogs.

### **Administrative Permissions Password Protection Guidelines**

These push permissions all pertain to the Org that the Admin is pushing to. It is possible to have different permissions in each Org be it a production or sandbox. A Quick Reference Palette has been added in the bottom right corner of the dialog box in the form of a Life Preserver. This Quick Reference Palette provides additional clarification regarding the permissions dialog.

Roger Case (rcase@org1.com)	Select All Select None
Sathya Sridhar (rcasesridhar@dreamfactory.co	M Quick Reference
Ingrid Madden (channel@yahoo.com)     Tom Zales (tomzales@dreamfactory.com)     Bill Appleton (billa@org1.com)     Susan Madden (order@org1.com)     Cynthia Capobianco (resource1@org1.com)     Mike Gaffney (mgaffney@counthywide.com)     Charles Medici (cmedici@yahoo.com)     Todd Appleton (todd@org1.com)     Matt Stoli (stoli@yahoo.com)	SnapShot Administrative Permissions gives a system administrator the ability to assign push permissions of the various types of assets found in a salesforce org to each administrator in that org. The user list at left contains all users that have 'Modify AII Data', 'Customize Application', and 'API Enabled' selected in their profile assignment. The status icon left of each user's name indicates the current permission level he or she has. Red means the user is currently denied from pushing any assets
Michael Gaffney (mgaffney@sempra.com)	via SnapShot interfaces. Yellow indicates the user is

Users have the ability to add a password to this dialog to control the allocation of permissions or to make changes to exisiting permissions. To add a password follow the steps below:

1. Click on the Add a permissions password hyperlink at the bottom of the dialog box

Roger Case (rcase@org1.com)	Select All Select None	
Sathya Sridhar (rcasesridhar@dreamfactory.com) Ingrid Madden (channel@yahoo.com) Tom Zales (tomzales@dreamfactory.com) Bill Appleton (billa@org1.com) Susan Madden (order@org1.com)	Apex Classes     Apex Components     Apex Pages     Apex Triggers	
Cynthia Capobianco (resource1@org1.com)	Objects Details	
Mike Gaffney (mgaffney@countrywide.com) Charles Medici (cmedici@yahoo.com)	✓ Profiles	
<ul> <li>Todd Appleton (todd@org1.com)</li> <li>Matt Stoli (stoli@yahoo.com)</li> <li>Michael Gaffney (mgaffney@seppina.com)</li> </ul>	Custom Applications	

2. Next, the Administrative Password dialog box will appear. Here the user can create the desired password.

Adm	inistrative Password	×
E	nter a new administrative permissions password:	
	•••••	]
	OK Cancel	

3. Click OK when done.

If an Admin wants to change the Admin permissions password, all they would have to do is click on the Change the permissions password hyperlink on the bottom left.

Administrators in your salesforce Org:	Assign push permissions for the selected adm	nistrato
🖲 Adam Buxbaum (adamss@df.com)	Select All Select None	
SnapShot Demo (ss@df.com)		-
	Apex Classes Apex Components	ľ
	Apex Pages	
	Apex Triggers	
	Objects Details	
	Profiles	
	Custom Applications	
	Custom Labels	(

Once selected, the Administrative Password dialog box will appear prompting the user to enter the old and new administrative passwords. Click OK when done. To clear the existing password, enter the old password and leave the new password blank, then click OK.

Administrative Password	
Enter the old administrative permissions password:	
Enter a new administrative permissions password:	
OK Cancel	

If a user attempts to push Assets that they do not have permission to push they will receive and error message as displayed in the screen shot below.

asset types to the	ot have permission to push the following destination org:
Page Layouts	

Users are also able to monitor all push transactions using the Snapshot Administrative Logger feature which creates an audit trial for each transaction. In addition, there are a number of prebuilt reports and dashboards where users can track and monitor these transacations.

## 2. Product Support:

The purpose of this document is to highlight the new enhancements made to the Asset Snapshot. 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 <a href="mailto:support@dreamfactory.com">support@dreamfactory.com</a>.

**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.