

Snapshot Feature Release Notes

These release notes support the new Find Objects in Reports Matrix.

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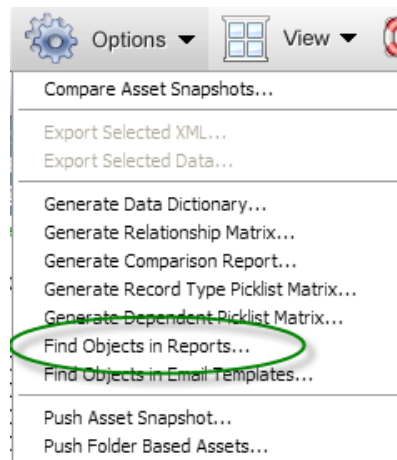
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1. Overview of the Find Objects in Reports Matrix

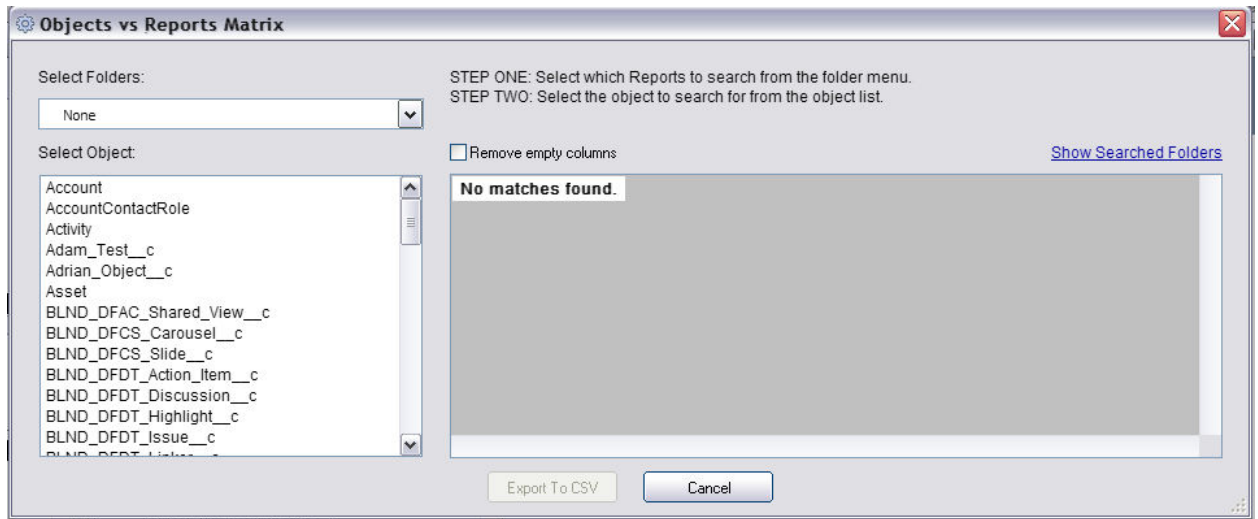
SnapShot has just added the Find Objects in Reports Matrix which allows users to view a field that is referenced within a Report. This matrix can be saved in a CSV format.

To access the Find Objects in Reports Matrix, follow the instructions below:

- A. Go to the Asset Snapshot
- B. Click on the Options Menu
- C. Select the Find Objects in Reports option



- D. Once selected, the Objects vs. Report Matrix will appear. Here is where users can select certain objects and see what reports certain fields are referenced in.



- E. To use the matrix for the steps detailed below:

1. Select which Reports to search from by simply clicking on the folder menu. Once selected Snapshot will then log into the Org to access the selected folders.

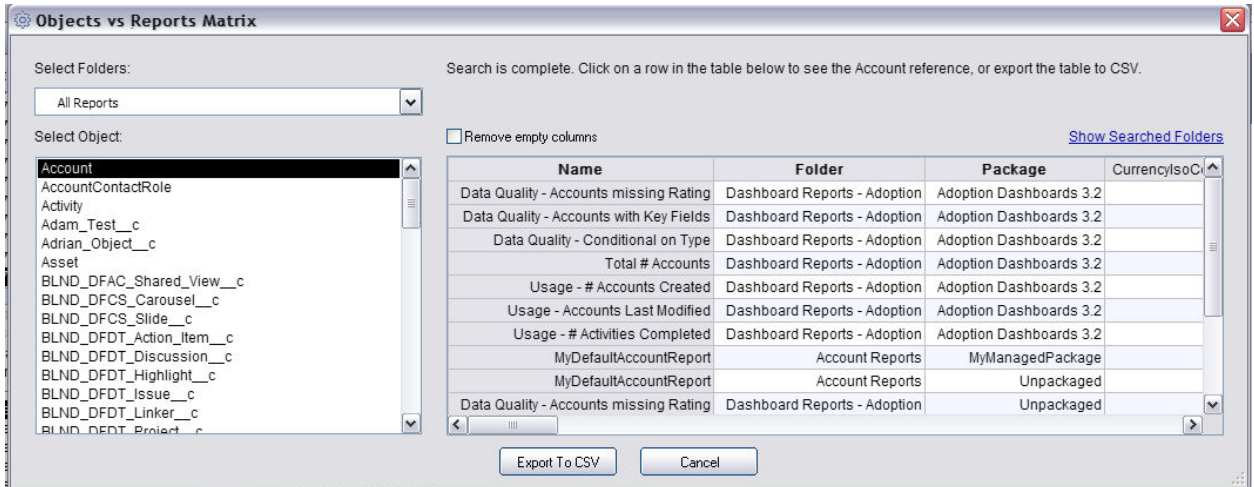


- Once selected a list of all Objects in your Org will appear in the left hand panel. Users will also see a box that contains multiple columns. These columns include:

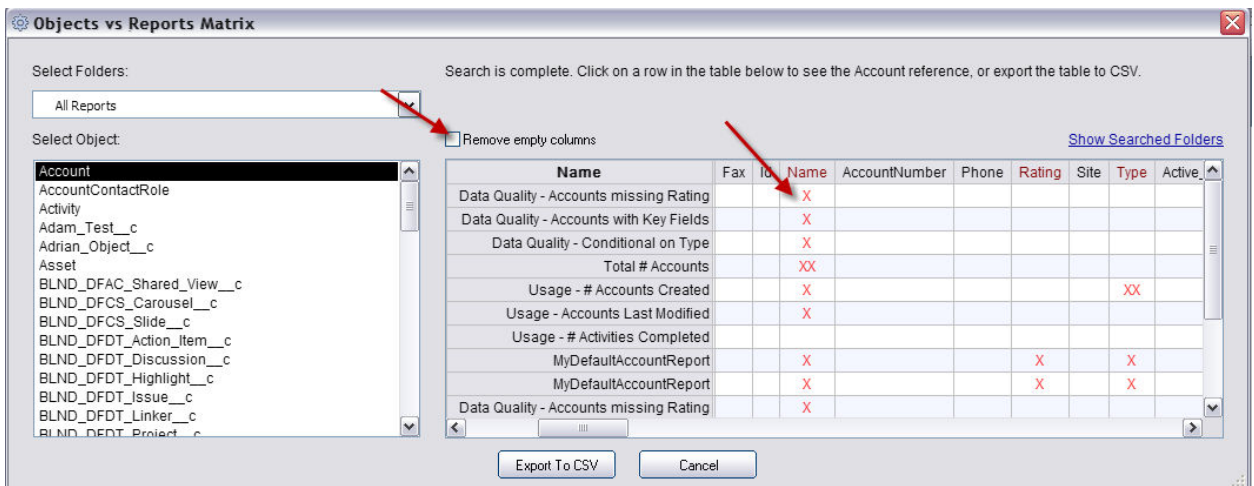
Name: The Name column displays the name of the Report

Folder: The Folder column displays the name of the Folder that the report is saved in,

Package: The Package column displays whether the folder is part of a package or not.



- Once the user selects their desired object, the columns of the box will populate displaying a red X next to the appropriate report. The number of X's displayed in the column equates to the number of times that field is referenced in that report. There is also a check box located in the top left of the box that allows users to remove any empty columns displaying on those fields have references.



- By clicking on a red X, a dialog box will appear displaying the raw XML of that report with the desired field highlighted.

Select Folders: All Reports

Select Object: Account

Search is complete. Click on a row in the table below to see the Account reference, or export the table to CSV.

Remove empty columns [Show Searched Folders](#)

Name	Fax	Id	Name	AccountNumber	Phone	Rating	Site	Type	Active
Data Quality - Accounts missing Rating			X						
Data Quality - Accounts with Key Fields			X						
Data Quality - Conditional on Type			X						
Total # Accounts			XX						

Total # Accounts

```

<field>ACCOUNT.NAME</field>
</columns>
<currency>USD</currency>
<description>Show my ALL accounts by owner role.</description>
<filter>
  <criteriaItems>
    <column>ACCOUNT.NAME</column>
    <operator>notEqual</operator>
  </criteriaItems>
  <language>en_US</language>
</filter>
<format>Summary</format>
<groupingsDown>
  <dateGranularity>Day</dateGranularity>
  <field>ROLLUP_DESCRIPTION</field>
  <sortOrder>Asc</sortOrder>
</groupingsDown>
  
```

- The results of the matrix can also be exported out to a csv file by clicking on the Export To CSV button.

Select Folders: All Reports

Select Object: Account

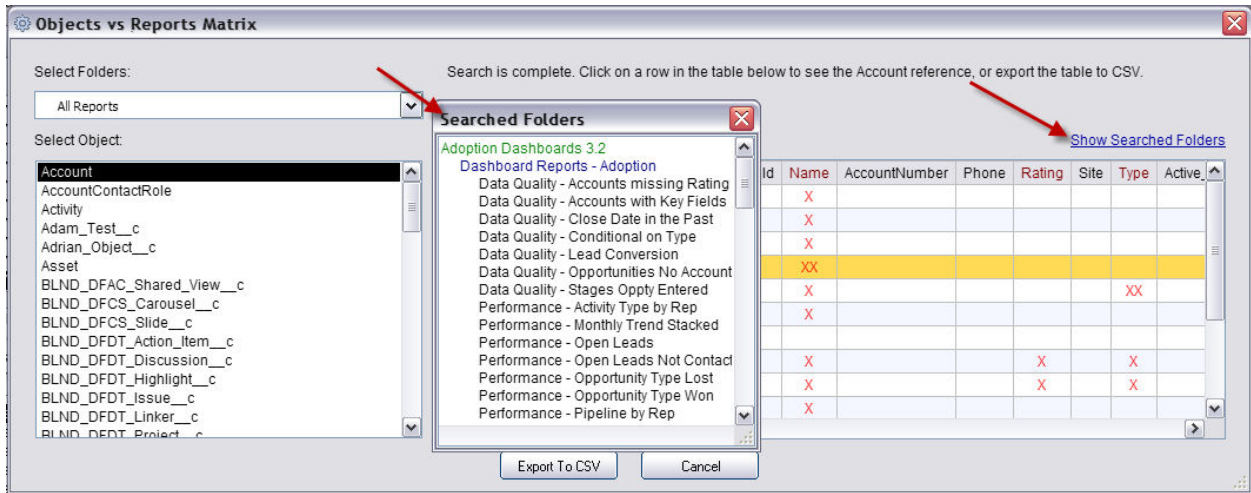
Search is complete. Click on a row in the table below to see the Account reference, or export the table to CSV.

Remove empty columns [Show Searched Folders](#)

Name	Fax	Id	Name	AccountNumber	Phone	Rating	Site	Type	Active
Data Quality - Accounts missing Rating			X						
Data Quality - Accounts with Key Fields			X						
Data Quality - Conditional on Type			X						
Total # Accounts			XX						
Usage - # Accounts Created			X					XX	
Usage - Accounts Last Modified			X						
Usage - # Activities Completed									
MyDefaultAccountReport			X			X		X	
MyDefaultAccountReport			X			X		X	
Data Quality - Accounts missing Rating			X						

Export To CSV **Cancel**

- In addition, if the user clicks on the Show Searched Folders link on the right side of the dialog box, a small dialog box will appear displaying all of the folders that were searched to obtain the matrix results.



2. Product Support:

The purpose of this document is to highlight the new Find Objects in Reports Matrix. 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.