

Snapshot Use Cases: Compliance, Governance, and Security

Introduction

Snapshot documents every aspect of the change and release management process. This information is useful for administrative governance during the release process and is also available as a permanent record for compliance. These documents can be stored as custom objects in your Salesforce account, saved as local files, or stored as Salesforce Content.

Snapshot also provides two dozen automated reports that are hugely beneficial for release management as well as corporate compliance, governance and security. These reports are available in CSV, HTML, and PDF format. They can be branded with a corporate logo and additional information. They can be sent as email attachments or Chatter Content. All of these reports can be scheduled and automated. Many of them have conditional triggers and are sent out only when problems are detected.

This whitepaper discusses common use cases for improving compliance, governance, and security at your company. This information should be helpful for Salesforce administrators, compliance managers, and security professionals.

Compliance, Governance, and Security

Here is an overview of the different documents and reports that Snapshot provides. Each individual report is discussed in detail in the sections below:

Compliance Documentation

- Time Series Snapshots
- Deployment History

Comparison Reports

- Time Series Differences
- Metadata Differences

Metadata Reports

- Asset History
- Similar Assets
- Data Dictionary
- Relationship Matrix
- Fields Vs Page Layouts
- Record Types Vs Picklists
- Controlling Vs Dependent Picklists

Data Usage Reports

- Field Usage
- Picklist Usage
- Last Activity Date
- Apex Code Coverage

Security Reports

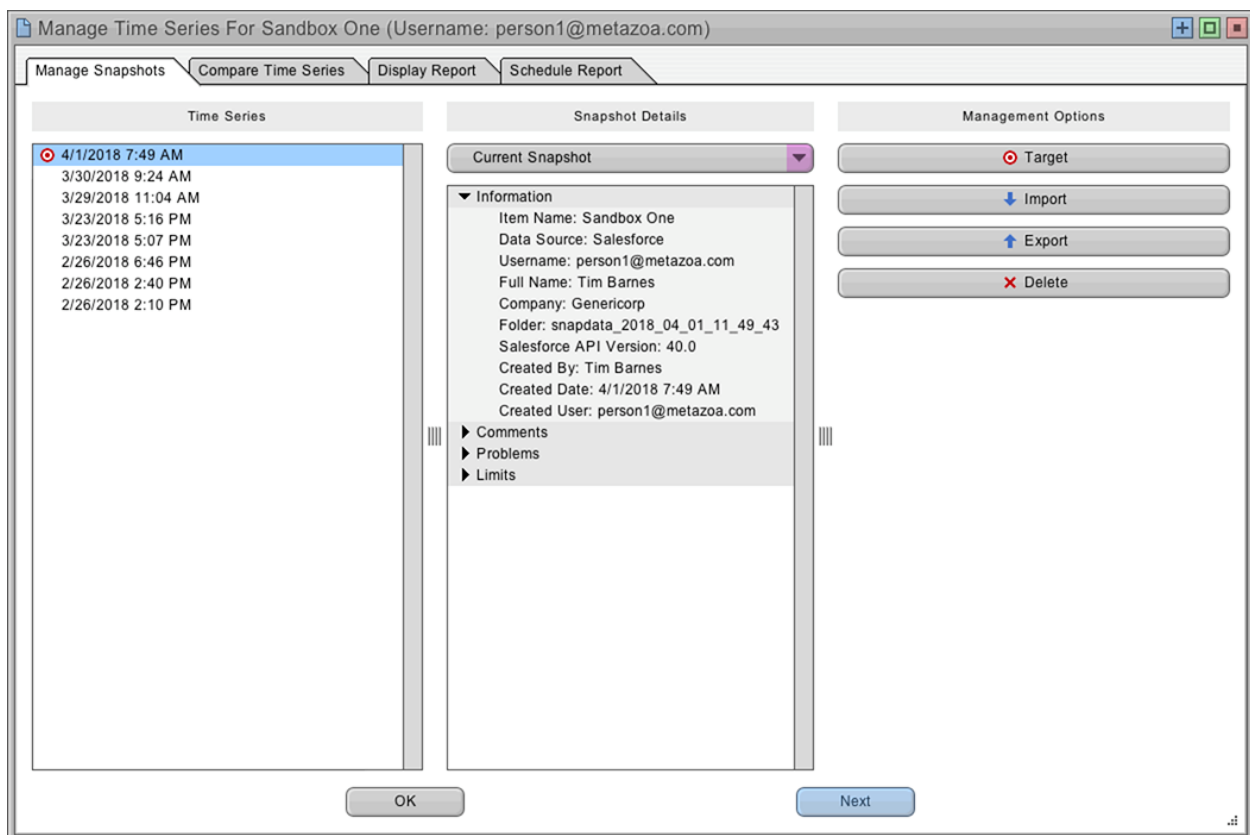
- Record Level Security
- User Activity Timeline
- Security Health Check
- Profiles and Permission Sets
- Combined Security

Time Series Snapshots

Each time a metadata snapshot is taken, the information is added to a time series. By virtue of simply using the Snapshot product, an administrator creates a time series record of all of the metadata changes in an org over time. The snapshots in the time series can be compared on a line by line basis, and you can run reports on any of the snapshots in the time series.

Each snapshot file contains a wealth of information about the state of a Salesforce account. The Metadata API, the Data API, the Tooling API, and the Force.com REST API are all used to collect information. The Metadata API captures the selected metadata assets. The Data API gathers Describe data on the selected Custom Objects. The Tooling API downloads additional information about creation and modification dates. The Force.com REST API records the organizational limits.

This information is automatically maintained on the client desktop computer where Snapshot is installed. All of the data is in the “storage” folder next to the snapshot.mzoa file. Each item on the Snapshot desktop has a corresponding folder that contains the time series data. The snapshot file can be automatically sent in email or saved to a repository as part of the scheduling and automation process. This information provides a foundation for compliance, and is also a necessary resource for the backup and recovery of the Salesforce org.

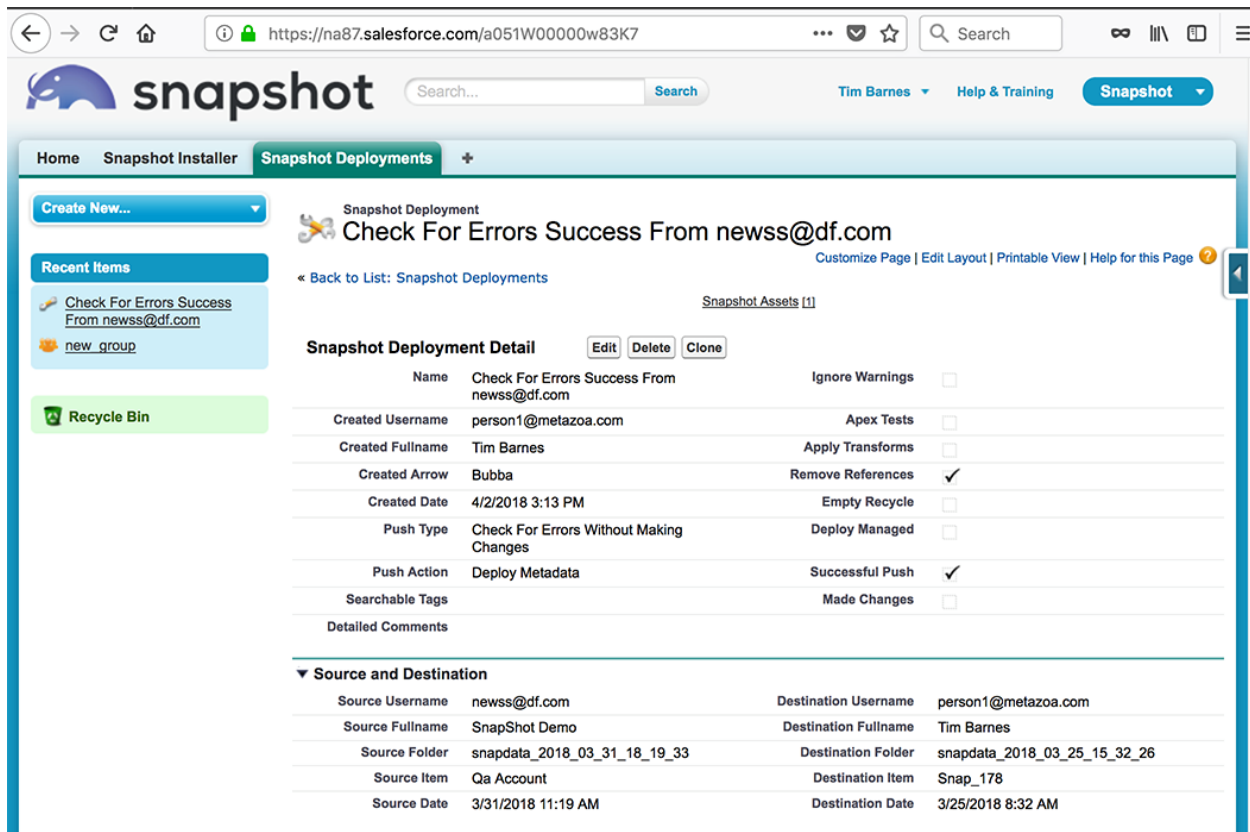


Deployment History

When a deployment is made, Snapshot adds all of the information about the deployment to two Custom Objects that are installed by our Managed Package in the licensed org. The Deployment History objects are used by administrators to verify that a given snapshot is up to date, to review historical deployments, and to work with previously used Create and Delete Job Lists. There is also a Deployment Report that is created for any deployment. This is a text version of the Deployment History objects. The Deployment Report is often sent as a human readable email when a deployment succeeds, fails, etc.

The name of the Custom Objects is **metazoa3__snapshot_push__c** and **metazoa3__snapshot_asset__c**. The **snapshot_push** object is the Master, and the **snapshot_asset** object is the Detail. The **snapshot_push** Master Object contains all of the information about the push: the source org, the destination org, the person conducting the deployment, the Create Job List, the Delete Job List, and all of the various settings for the push. The **snapshot_asset** Child Object contains all of the individual assets contained in the Create and Delete Job List.

The Deployment History can be searched and reported on in the Salesforce HTML interface. Workflow triggers can be created to alert administrators that a deployment has occurred when these objects are created. These objects capture any push by the Snapshot product between any two orgs, and so they contain a complete picture of all administrative activity with Snapshot. Below is a picture of the **snapshot_push** object in the Salesforce HTML interface.



The screenshot shows the Salesforce interface for the Snapshot product. The top navigation bar includes the Snapshot logo, a search bar, and user information (Tim Barnes). The main content area is titled 'Snapshot Deployments' and shows a list of recent items. The selected item is 'Check For Errors Success From newss@df.com'. The details section shows the following information:

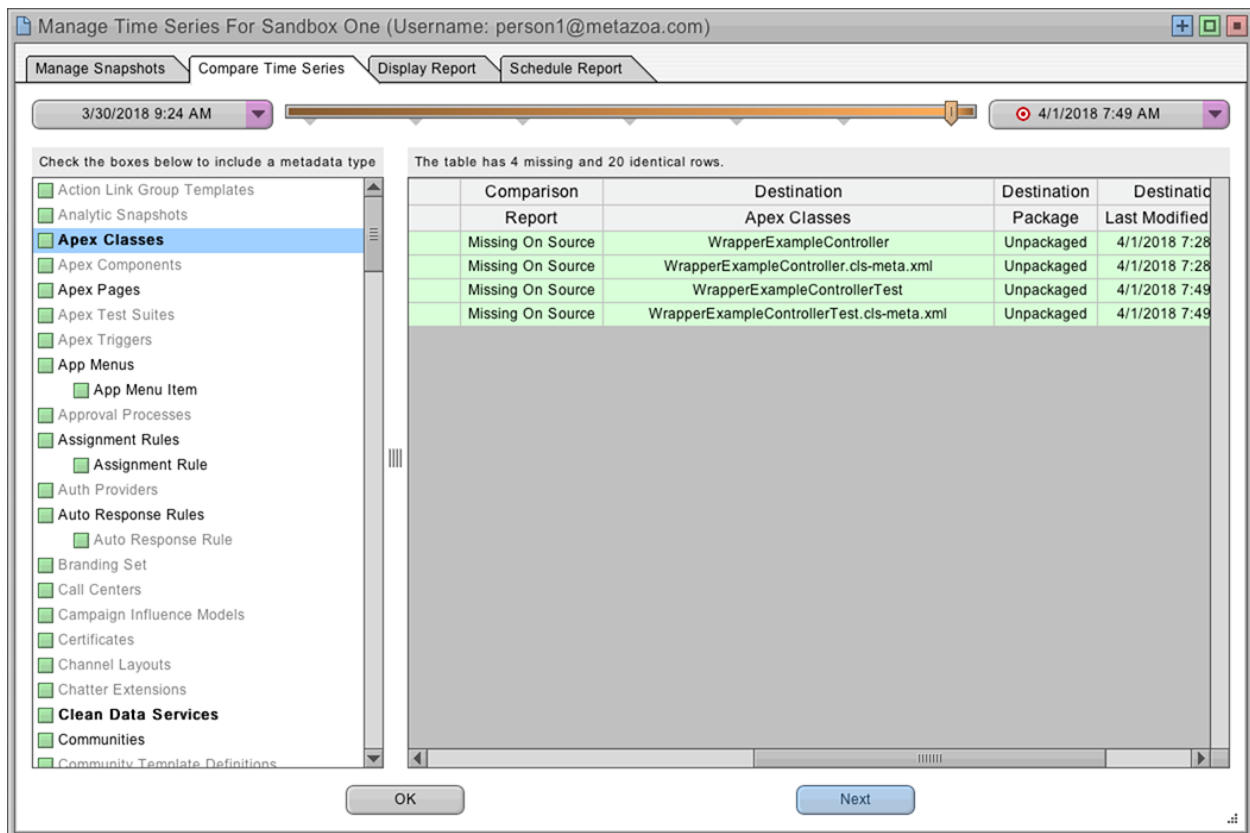
Snapshot Deployment Detail		Snapshot Assets (1)	
Name	Check For Errors Success From newss@df.com	Ignore Warnings	<input type="checkbox"/>
Created Username	person1@metazoa.com	Apex Tests	<input type="checkbox"/>
Created Fullname	Tim Barnes	Apply Transforms	<input type="checkbox"/>
Created Arrow	Bubba	Remove References	<input checked="" type="checkbox"/>
Created Date	4/2/2018 3:13 PM	Empty Recycle	<input type="checkbox"/>
Push Type	Check For Errors Without Making Changes	Deploy Managed	<input type="checkbox"/>
Push Action	Deploy Metadata	Successful Push	<input checked="" type="checkbox"/>
Searchable Tags		Made Changes	<input type="checkbox"/>
Detailed Comments			
▼ Source and Destination			
Source Username	newss@df.com	Destination Username	person1@metazoa.com
Source Fullname	SnapShot Demo	Destination Fullname	Tim Barnes
Source Folder	snapdata_2018_03_31_18_19_33	Destination Folder	snapdata_2018_03_25_15_32_26
Source Item	Qa Account	Destination Item	Snap_178
Source Date	3/31/2018 11:19 AM	Destination Date	3/25/2018 8:32 AM

Time Series Differences

Each time a metadata snapshot is taken, the information is added to a time series. The Time Series Differences report can compare any two snapshots in the time series. This provides a complete picture of all metadata changes in the org over time. The report can drill down into sub-types as well. This can show, for example, the date and time that an admin added individual Fields to an Object. This report is available for any Salesforce org or any developer project stored in a repository.

The Time Series Difference report can be scheduled. For example, the report might calculate metadata differences after a nightly snapshot of the org is taken. The report can be sent out to administrators as an email attachment or Chatter Content. The Schedule Report tab has an option to make this conditional, and only send the message if differences are detected. Used in this manner, the Time Series Differences report can automatically document metadata changes in an org and notify administrators.

There are a variety of compliance and governance use cases for this capability. First, if a group of developers are working on a particular project, the differences report documents all progress as assets are added to the org or developer repository. Second, the developers might use this report to catch unwanted or accidental changes to any section of metadata. Perhaps another development team changed something, or an employee used the Setup Menu. Lastly, any compliance organization wanting a dynamic update on metadata changes could use these report for that purpose.



Manage Time Series For Sandbox One (Username: person1@metazoa.com)

Manage Snapshots Compare Time Series Display Report Schedule Report

3/30/2018 9:24 AM 4/1/2018 7:49 AM

Check the boxes below to include a metadata type

- ☐ Action Link Group Templates
- ☐ Analytic Snapshots
- ☒ **Apex Classes**
- ☐ Apex Components
- ☐ Apex Pages
- ☐ Apex Test Suites
- ☐ Apex Triggers
- ☐ App Menus
 - ☐ App Menu Item
- ☐ Approval Processes
- ☐ Assignment Rules
 - ☐ Assignment Rule
- ☐ Auth Providers
- ☐ Auto Response Rules
 - ☐ Auto Response Rule
- ☐ Branding Set
- ☐ Call Centers
- ☐ Campaign Influence Models
- ☐ Certificates
- ☐ Channel Layouts
- ☐ Chatter Extensions
- ☐ **Clean Data Services**
- ☐ Communities
- ☐ Community Template Definitions

The table has 4 missing and 20 identical rows.

Comparison Report	Destination Apex Classes	Destination Package	Destination Last Modified
Missing On Source	WrapperExampleController	Unpackaged	4/1/2018 7:28
Missing On Source	WrapperExampleController.cls-meta.xml	Unpackaged	4/1/2018 7:28
Missing On Source	WrapperExampleControllerTest	Unpackaged	4/1/2018 7:49
Missing On Source	WrapperExampleControllerTest.cls-meta.xml	Unpackaged	4/1/2018 7:49

OK Next

Metadata Differences

The Metadata Differences report is similar to the Time Series Differences report, but instead of looking at one org over time, this report looks at the differences between two orgs connected by a deployment arrow. The report specifies the number of differences for each metadata type, and the top slide down panel allows an administrator to drill down into the line by line details.

This report can be used to explore the exact differences between two Salesforce orgs, or a developer project and a Salesforce org. For example, if an administrator is getting ready to migrate a Sandbox into Production, then they could use this report to explore and document the differences before migration.

In the example below, you can see all of the differences between the Custom Objects in two connected Salesforce orgs. The Custom Object **Adam_Bar__c** is showing a total of 7 differences. Slide down the top panel, and you can drill down into every difference on a line by line basis. The first difference shows that the destination org has the extra field **Build_Date__c** defined in a compact layout. You could select the metadata sub type Compact Layouts from the lower left list to further target those differences.

Metadata Differences For Push_94 (person1@metazoa.com to newss@df.com)

Select Metadata Types | Display Report | Schedule Report

```
<compactLayoutAssignment>SYSTEM</compactLayoutAssignment>
<compactLayouts>
  <fullName>another</fullName>
  <fields>Name</fields>
  <fields>Adam_Bar_Picklist__c</fields>
  <fields>controller__c</fields>
  <label>another</label>
</compactLayouts>
<deploymentStatus>Deployed</deploymentStatus>
<enableActivities>false</enableActivities>
```

Created By: Tim Barnes on 3/23/2018 5:16 PM
Last Modified By: Tim Barnes on 3/29/2018 11:43 AM

```
<compactLayoutAssignment>SYSTEM</compactLayoutAssignment>
<compactLayouts>
  <fullName>another</fullName>
  <fields>Name</fields>
  <fields>Adam_Bar_Picklist__c</fields>
  <fields>Build_Date__c</fields>
  <fields>controller__c</fields>
  <label>another</label>
</compactLayouts>
<deploymentStatus>Deployed</deploymentStatus>
<enableActivities>false</enableActivities>
```

Created By: SnapShot Demo on 7/9/2013 6:27 PM
Last Modified By: SnapShot Demo on 3/29/2018 8:16 PM

Check the boxes below to include

- ☐ Community Template Definition
- ☐ Community Theme Definition
- ☒ Connected Apps
- ☐ Content Assets
- ☐ CORS Whitelist Origin
- ☐ CSP Trusted Site
- ☒ Custom Applications
- ☒ Custom Application Components
- ☒ Custom Feed Filters
- ☒ Custom Labels
 - ☐ Custom Label
- ☒ Custom Metadata
- ☒ Custom Objects
 - ☒ Business Processes
 - ☒ Compact Layouts

The table has 29 different, 136 missing, and 42 identical rows.

Source Package	Source Custom Objects	Comparison Report	Destination Custom Objects
		Missing On Source	Adam_Bar__c
		Missing On Source	A_DX_Object__c
Unpackaged	Account	35 Differences	Account
		Missing On Source	Account_Custom_Settings__c
		Missing On Source	Account_Platform_Event__e
Unpackaged	Activity	3 Differences	Activity
Unpackaged	Adam_Bar__c	7 Differences	Adam_Bar__c
Unpackaged	always_visible__c	Missing On Destination	
Unpackaged	Asset	1 Difference	Asset
Unpackaged	Bill_Jen__c	Missing On Destination	
Unpackaged	bill_parent__c	Missing On Destination	
Unpackaged	BLND_DFAC_Shared_View__c	3 Differences	BLND_DFAC_Shared_View__c
Unpackaged	BLND_DFCS_Carousel__c	2 Differences	BLND_DFCS_Carousel__c

OK Next

Asset History

Think for a second about your production Salesforce account. Most orgs will have Custom Tabs, Page Layouts, Custom Objects, Profiles, Visualforce Pages, and many other configurations. The Metadata API currently supports about 150 different types. And for each type, there are many individual assets. An Unlimited Edition org can have up to 2000 Custom Objects, each with a maximum of 500 fields. There can be hundreds or even thousands of Roles, Profiles, Dashboards, and other assets.

Now think about this. Where did all that stuff come from? Who deployed it? When was it deployed? Was it tested in a Sandbox? Was it modified with the Setup Menu? What was the chain of custody from the original developer who created it down through various Sandboxes and other staging orgs before it ended up in your production account?

The new Asset History Report can answer these questions. This report mines the “meta metadata” that Snapshot stores in the licensed org along with additional information from the Salesforce Metadata, Tooling, and Data API. As a result, the Asset History Report can tell you *where* each metadata asset was originally created, *what* changes were made to the asset, *who* made these changes, *which* orgs the asset moved through, and *when* the asset was last modified. This is a game-changing report for compliance, security, and governance.

Asset History For Sandbox One (Username: person1@metazoa.com)

Select Metadata Types
Display Report
Schedule Report

Check the boxes below to include a met

☐ Connected Apps
☐ Content Assets
☐ CORS Whitelist Origin
☐ CSP Trusted Site
☒ Custom Applications
☐ Custom Application Components
☐ Custom Feed Filters
☒ Custom Labels
☐ Custom Label
☐ Custom Metadata
☒ Custom Objects
☐ Business Processes
☐ Compact Layouts
☒ Fields
☐ Field Sets
☐ List Views
☐ Record Types
☐ Sharing Reasons
☐ Validation Rules
☐ Web Links
☒ Custom Object Translations
☐ Fields
☐ Page Layouts
☐ Quick Actions
☐ Record Types
☐ Sharing Reasons

This table shows a preview of the selected metadata type.

Asset	Element	Created By	Created Date	Last Modified By
AccountContactRole	Role	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Activity	DB_Activity_Type__c	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Activity	DB_Activity_Type__c	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Adam_Bar__c	Adam_Bar_Picklist__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	controller__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	dependent__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	dominant__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	Empty_field__c	Tim Barnes	3/29/2018 11:46 AM	Tim Barnes
Adam_Bar__c	iscontrolled__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	My_text_area__c	Tim Barnes	3/29/2018 11:46 AM	Tim Barnes
Adam_Bar__c	Referral_Source__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
Adam_Bar__c	subservient__c	Tim Barnes	3/23/2018 5:16 PM	Tim Barnes
always_visible__c	my_field__c	Tim Barnes	10/10/2017 11:07 AM	Tim Barnes
Asset	AccountId	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	AssetLevel	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	AssetProvidedById	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	AssetServicedById	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	ContactId	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	Description	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	InstallDate	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	IsCompetitorProduct	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	IsInternal	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	Name	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes
Asset	ParentId	Tim Barnes	4/1/2018 7:49 AM	Tim Barnes

OK
Next

Similar Assets

The Similar Assets report shows the number of differences between assets of the same metadata type. For example, you might find that some Reports are identical in your org. This report is often used to find duplicate Custom Objects, Profiles, and Page Layouts as well. The top slider provides line by line detail of all differences. The Similar Assets report is useful for cleaning up duplicate assets and understanding the metadata structure of your account.

Similar Assets For Sandbox One (Username: person1@metazoa.com)

Select Metadata Types | Display Report | Schedule Report

```

<columns>
  <field>START_DATE</field>
</columns>
<columns>
  <field>END_DATE</field>
</columns>
<columns>
  <field>CAMPAIGN_DESCRIPTION</field>
</columns>
<columns>
  <field>Campaign.DB_Campaign_Tactic__c</field>

```

Row Asset: DB_Adoption/DB_Adoption_Campaigns
Created By: Tim Barnes on 1/17/2018 4:00 PM

```

<columns>
  <field>STATUS</field>
</columns>
<columns>
  <field>CREATED_DATE</field>
</columns>

```

Column Asset: DB_Adoption/DB_Adoption_ACTIVITIES_Wall_of_Shame
Created By: Tim Barnes on 1/17/2018 4:00 PM

Check the boxes below to include a metadata type:

- ☐ Queues
- ☐ Quick Actions
- ☐ Remote Site Settings
- ☒ Reports
- ☐ Report Types
- ☐ Roles
- ☐ SAML SSO Configurations
- ☐ Scontrols
- ☐ Settings
- ☐ Sharing Rules
- ☐ Sharing Sets
- ☐ Site Dot Com
- ☐ Skills
- ☐ Standard Value Sets

This table shows a preview of the selected metadata type.

Reports	Fame	Unpackaged DB_Adoption DB_Adoption_ACTIVITIES_Wall_of_Shame	DB_Adoption_ACTIVITIES_Wall_of_Shame
DB_Adoption_ACCOUNTS_w_o_Fields_Pop			
Salesforce Adoption Dashboards DB_Adoption DB_Adoption_ACTIVITIES_Wall_of_Fame		4 Differences	23
Salesforce Adoption Dashboards DB_Adoption DB_Adoption_ACTIVITIES_Wall_of_Shame		Identical Assets	23
Salesforce Adoption Dashboards DB_Adoption DB_Adoption_Campaigns		23 Differences	Identical
Salesforce Adoption Dashboards DB_Adoption DB_Adoption_Campaigns by Status		24 Differences	12

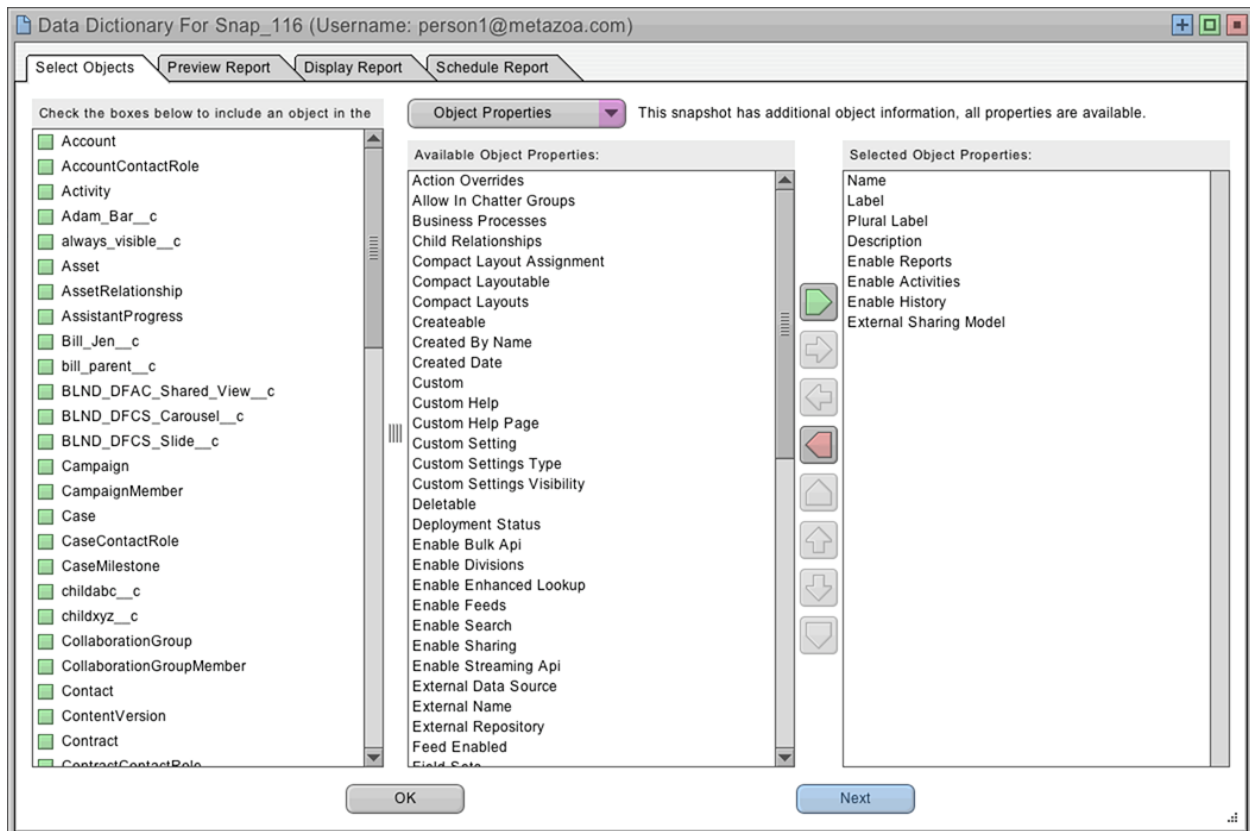
OK Next

Data Dictionary

The Data Dictionary report is used to provide complete documentation on the state of Custom and Standard Objects in your org. Any number of Objects can be selected for the report. Then the report can be customized to include Summary Statistics, Organization Limits, Object Properties, Field Properties, Object Relationships and Field Relationships.

The Organization Limits include 20+ limits such as Daily API Requests and Daily Storage MB. The Object Properties include 50+ different Object properties such as Label and Description. The Field Properties include 80+ Field properties such as Inline Help Text and Formula. The Object and Field Relationships show how the given Object or Field is related to any of the other metadata types.

The Data Dictionary is a key report for compliance and documentation. Companies often archive this report to document the state of their org over time. All of the columns in the report can be customized to provide only the information that a company deems relevant for compliance. System Integrators often present this report to customers to document the current state of the org.



Data Dictionary For Snap_116 (Username: person1@metazoa.com)

Select Objects | Preview Report | Display Report | Schedule Report

Check the boxes below to include an object in the

Object Properties

This snapshot has additional object information, all properties are available.

Available Object Properties:

- Action Overrides
- Allow In Chatter Groups
- Business Processes
- Child Relationships
- Compact Layout Assignment
- Compact Layoutable
- Compact Layouts
- Createable
- Created By Name
- Created Date
- Custom
- Custom Help
- Custom Help Page
- Custom Setting
- Custom Settings Type
- Custom Settings Visibility
- Deletable
- Deployment Status
- Enable Bulk Api
- Enable Divisions
- Enable Enhanced Lookup
- Enable Feeds
- Enable Search
- Enable Sharing
- Enable Streaming Api
- External Data Source
- External Name
- External Repository
- Feed Enabled
- Field Set

Selected Object Properties:

- Name
- Label
- Plural Label
- Description
- Enable Reports
- Enable Activities
- Enable History
- External Sharing Model

OK Next

Relationship Matrix For Production (Username: news@df.com)

Select Related Assets

Preview Matrix

Display Report

Schedule Report

Manage Report

Click this button to add the current relationship matrix to the list of reports.

Relationship 1 of 3

The Reports are listed on the left and the Custom Objects are across the top.

Reports That Reference Custom Objects	Lead	Opportunity	Task
Account_Only			
Joined_Reports Account_Primary			
Joined_Reports Joined_Opp_Report		block/reportType (2) Report/reportType (1)	
Sales_Marketing_Dashboard_Reports Activities_by_Salesperson	rows/field (1)	columns/field (1)	columns/field (1)
Sales_Marketing_Dashboard_Reports CampaignROIbyCampaignType			
Sales_Marketing_Dashboard_Reports CampaignsbyROI			
Sales_Marketing_Dashboard_Reports Closed_Deals_leader_board		Report/reportType (1)	
Sales_Marketing_Dashboard_Reports Closed_opportunity		Report/reportType (1)	
Sales_Marketing_Dashboard_Reports Marketing_Exec_Amount_per_Camp			
Sales_Marketing_Dashboard_Reports Marketing_Exec_Lead_Trends_by_Status	Report/name (1)		
Sales_Marketing_Dashboard_Reports Marketing_Exec_Leads_by_Campaigns			
Sales_Marketing_Dashboard_Reports OpportunityProductPipeline		Report/name (1)	

Select a relationship from the table at left and see the cc

```

<params>
  <name>terr</name>
  <value>all</value>
</params>
<params>
  <name>open</name>
  <value>all</value>
</params>
<params>
  <name>probability</name>
  <value>&gt;0</value>
</params>
<params>
  <name>co</name>
  <value>1</value>
</params>
<reportType>Opportunity</reportType>
<scope>organization</scope>
<timeFrameFilter>
  <dateColumn>CLOSE_DATE</dateColumn>
  <interval>INTERVAL_CURRENT</interval>
</timeFrameFilter>
</block>
<block>
  <blockInfo>
    <blockId>B0</blockId>
    <joinTable>0</joinTable>
  </blockInfo>
  <columns>
    <field>ACCOUNT_NAME</field>
  </columns>
  <columns>
    <field>ACCOUNT_TYPE</field>
  </columns>

```

OK

Next

Fields Vs Page Layouts

The Fields Vs Page Layouts report documents which fields are on which page layout. Each field can be required, editable, read only, or missing. This is a useful report for compliance and documentation. When looking at any column, you can see all of the status of every Field on the Page Layout. When looking across any row, you can see which layouts an individual Field appears on. This report is often used to verify that a particular Field appears on some Page Layouts but not on others.

Fields Vs Page Layouts For Production (Username: newss@df.com)

Select Objects

Display Report

Schedule Report

Check the boxes below to include an object:

► DocuSign For Salesforce

► DreamFactory

► DX Package

► Field Trip

► Salesforce1 Polling Application

► Snapshot

► Test Package

▼ Unpackaged

☒ A_DX_Object__c

☒ Account

☐ Account_Custom_Settings__c

☐ Account_Platform_Event__e

☐ AccountContactRole

☐ Activity

☒ Adam_Bar__c

☒ Asset

☐ AssetRelationship

☐ AssistantProgress

☒ BLND_DFAC_Shared_View__c

☒ BLND_DFCS_Carousel__c

☒ BLND_DFCS_Slide__c

☒ BLND_DFDI_Action_Item__c

☒ BLND_DFDI_Discussion__c

☒ BLND_DFDI_Highlight__c

☒ BLND_DFDI_Issue__c

☒ BLND_DFDI_Link__c

This table shows a preview of the selected object.

Unpackaged Account	Unpackaged Account-Account (Sales) Layout	Unpackaged Account-Account (Support) Layout	Account-Account (Sales) Layout
A_Formula_Field__c	Read Only	Read Only	
A_Long_Number__c	Edit	Edit	
AA_Field__c	Edit		
Account_Depth__c	Edit		
AccountNumber	Edit	Edit	
AccountSource			
Active__c	Required	Edit	
Adam_Test__c			
AnnualRevenue	Edit	Edit	
BillingAddress	Edit	Edit	
CreatedById	Read Only	Read Only	
CustomerPriority__c	Edit	Edit	
Description	Edit	Edit	
Fax	Edit	Edit	
Industry	Edit	Edit	
IsActive__c	Read Only	Read Only	
LastModifiedById	Read Only	Read Only	
Multi_select_Picklist__c			
My_Picklist_field__c	Edit	Edit	
Name	Required	Required	
Number_picklist__c	Edit	Edit	
NumberOfEmployees	Edit	Edit	

OK

Next

Record Types Vs Picklists

The Record Types Vs Picklists report shows how the Picklists for any object are modified by all of the Record Types for that Object. On the first column, you can see all of the Picklist values, and then on each Record Type column after that, you can see how the Picklist changes. This is helpful in understanding the metadata structure of your org and preventing errors when Record Types and Picklists get complex.

Record Types Vs Picklists For Production (Username: newss@df.com)

Select Objects Display Report Schedule Report

Check the boxes below to include an object:

- DocuSign For Salesforce
- DreamFactory
- DX Package
- Field Trip
- Salesforce1 Polling Application
- Snapshot
- Test Package
- Unpackaged
 - ☐ A_DX_Object__c
 - ☒ Account
 - ☐ Account_Custom_Settings__c
 - ☐ Account_Platform_Event__c
 - ☒ AccountContactRole
 - ☐ Activity
 - ☒ Adam_Bar__c
 - ☒ Asset
 - ☒ AssetRelationship
 - ☐ AssistantProgress
 - ☐ BLND_DFAC_Shared_View__c
 - ☒ BLND_DFCS_Carousel__c
 - ☒ BLND_DFCS_Slide__c
 - ☒ BLND_DFDI_Action_Item__c
 - ☐ BLND_DFDI_Discussion__c
 - ☒ BLND_DFDI_Highlight__c
 - ☒ BLND_DFDI_Issue__c
 - ☐ BLND_DFDI_Link__c

This table shows a preview of the selected object.

Unpackaged: Account	All Values	Account_Rec_Type1	Account_Rec_Type2
Name: Account_Depth__c Label: Account Depth	Deep Deeper Deepest =Shallow= Super Deep	Deep =Deeper= Shallow Super Deep	Deep Deeper =Shallow= Super Deep
Name: AccountSource LeadSource	Advertisement Cold Call Employee Referral External Referral Partner Public Relations Web Seminar Trade Show Web Word of mouth Other	Web	Web Other
Name: Active__c Label: Active	No Yes	=Yes=	No
Name: CorporateDesktopHWStandard__c Label: Corporate Desktop HW Standard	HP IBM Compaq Dell Other		
Name: CorporateDesktopOSStandard__c Label: Corporate Desktop OS Standard	Windows 98 Windows 2000 Windows XP Mac OS Other Windows 95		
Name: Countries__c Label: Countries	Canada France	Canada France	Canada France

OK Next

Controlling Vs Dependent Picklists

This report places information about controlling and dependent Picklists in an easy to read tabular format. This is helpful in understanding the metadata structure of your org and preventing errors when controlling Picklists get complex. Both the controlled values and the uncontrolled values are listed in the report.

Controlling Vs Dependent Picklists For Production (Username: newss@df.com)

Select Objects
Display Report
Schedule Report

Check the boxes below to include an object in the

- DocuSign For Salesforce
- DreamFactory
- DX Package
- Field Trip
- Salesforce1 Polling Application
- Snapshot
- Test Package
- Unpackaged
 - ☐ A_DX_Object__c
 - ☒ Account
 - ☐ Account_Custom_Settings__c
 - ☐ Account_Platform_Event__e
 - ☐ AccountContactRole
 - ☐ Activity
 - ☒ Adam_Bar__c
 - ☐ Asset
 - ☐ AssetRelationship
 - ☐ AssistantProgress
 - ☐ BLND_DFAC_Shared_View__c
 - ☐ BLND_DFCS_Carousel__c
 - ☐ BLND_DFCS_Slide__c
 - ☐ BLND_DFDT_Action_Item__c
 - ☐ BLND_DFDT_Discussion__c
 - ☐ BLND_DFDT_Highlight__c
 - ☐ BLND_DFDT_Issue__c
 - ☐ BLND_DFDT_Link__c

This table shows a preview of the selected object.

Unpackaged Account	Controlling Values	Countries__c (Region__c)	Subregions__c (Region__c)
Name: Region__c Label: Region	Africa	Morocco Mozambique	Mediterranean Sahara South Africa Western Africa
	Americas		Caribbean North America South America
	Asia	India Pakistan Turkey	Eurasia Indian Subcontinent
	Asia Pacific		Indian Subcontinent
	Australia		Eurasia
	Europe	France Ireland Turkey UK	
	=Uncontrolled=	Canada USA	Eastern Europe Northeastern Africa Russia Western Europe

OK
Next

Field Usage

The Field Usage report examines a set of records from any Standard or Custom Object. The set can include all records, records chosen by name, or records selected with a filter. Then the report examines each field in the selected Object. The report shows the total number of fields, how many fields are equal to the default value, how many fields are empty, and how many fields have distinct values.

The Field Usage report can also interactively list the least and most popular values for any selected field. On the one hand, this capability helps an administrator drill down on unique or aberrant field values, and on the other hand, this capability provides an easy way to see overused or duplicate values.

This report is extremely useful for finding rarely used or misused fields in any object. Fields that are less distinct (and therefore more uniform) should be looked at closely. Sometimes they are mainly empty. Other times they might be rarely used, forgotten, or neglected. In other cases, a lack of Distinct values might be appropriate. For example, company zip codes will be less distinct than company names.

This information could suggest policy problems, corrective actions, or administrative changes. Perhaps an unused field should simply be deleted. The sales team almost never fills in the Customer Website Field when a new account is created. Should this be a required Field? Missing or empty data can also point to upstream data entry, external integration, or website problems.

Field Usage For Production (Username: newss@df.com)

Select Objects

Preview Report

Display Report

Schedule Report

This table shows a preview of the selected object on the first tab.

Account Labels	Type	Total	Default	Empty	Distinct	Default %	Empty %	Distinct %
Shipping Country Code	picklist	115	4	109	4	3.47%	94.78%	3.47%
Upsell Opportunity	picklist	115	104	104	4	90.43%	90.43%	3.47%
ing Geocode Accuracy	picklist	115	59	59	5	51.30%	51.30%	4.34%
SLA	picklist	115	104	104	5	90.43%	90.43%	4.34%
Shipping City	string	115	109	109	7	94.78%	94.78%	6.08%
Shipping Zip/Postal Code	string	115	109	109	7	94.78%	94.78%	6.08%
Ticker Symbol	string	115	107	107	7	93.04%	93.04%	6.08%
Account Type	picklist	115	32	32	7	27.82%	27.82%	6.08%
Billing Country Code	picklist	115	85	12	10	73.91%	10.43%	8.69%
SIC Code	string	115	104	104	10	90.43%	90.43%	8.69%
SLA Serial Number	string	115	104	104	12	90.43%	90.43%	10.43%
Account Number	string	115	103	103	13	89.56%	89.56%	11.30%
Billing Country	string	115	12	12	13	10.43%	10.43%	11.30%
Billing State/Province	string	115	20	20	14	17.39%	17.39%	12.17%
Shipping Street	textarea	115	101	101	15	87.82%	87.82%	13.04%
Employees	int	115	99	99	17	86.08%	86.08%	14.78%
Industry	picklist	115	77	77	20	66.95%	66.95%	17.39%
Account Fax	phone	115	93	93	23	80.86%	80.86%	20.00%
Website	url	115	60	60	54	52.17%	52.17%	46.95%
Billing Zip/Postal Code	string	115	53	53	61	46.08%	46.08%	53.04%
Billing City	string	115	38	38	67	33.04%	33.04%	58.26%
Billing Street	textarea	115	43	43	73	37.39%	37.39%	63.47%
Account Phone	phone	115	9	9	107	7.82%	7.82%	93.04%
Company Name	string	115	0	0	115	0.00%	0.00%	100.00%
Photo URL	url	115	0	0	115	0.00%	0.00%	100.00%

Show Most Popular Values

Show Least Popular Values

Select a row from the table at left to see the value:

Denver	1	0.86%
Columbus	1	0.86%
colombo	1	0.86%
Chicago	1	0.86%
Centennial	1	0.86%
Cary	1	0.86%
Cambridge	1	0.86%
Burlington	1	0.86%
Broussard	1	0.86%
Bradentown	1	0.86%
Billerica	1	0.86%
Beaverton	1	0.86%
Aylesbury	1	0.86%
Andover	1	0.86%
Atlanta	1	0.86%
Austin	2	1.73%
San Mateo	2	1.73%
San Francisco	2	1.73%
Portland	2	1.73%
Dallas	2	1.73%
New York	7	6.08%
	38	33.04%
Total Distinct Values	67	100.00%

OK

Next

Picklist Usage

The Picklist Usage report examines a set of records from any Standard or Custom Object. The set can include all records, records chosen by name, or records selected with a filter. Then the report examines each Picklist in the selected Object. The report shows the total number of Picklist values, and how many times each Picklist value is being used in the record set. The report can also be expanded to break down Picklist usage by each Record Type in the Object.

This report is extremely useful for finding rarely used or misused values in any Picklist. The Other Values column (pictured below) shows miscellaneous values that are not actually in the Picklist. This is useful for discovering new values that should be incorporated into the Picklist, and also for cleaning up Picklist data that contains with the wrong value.

This information could suggest policy problems, corrective actions, or administrative changes. Perhaps an unused Picklist value should simply be deleted, or maybe one of the Other Values needs to be added to the list. Examining Picklist usage by Record Type is also useful. You can see which Record Types are using what Picklist values.

Picklist Usage For Production (Username: newss@df.com)

Select Objects Preview Report Display Report Schedule Report

This table shows a preview of the selected object on the first tab.

Account Fields	Picklist Values	Other Values	Total	Count	Percent
Account_Depth__c	Deeper		115	2	1.73%
	=Shallow=		115	100	86.95%
		empty	115	13	11.30%
AccountSource		empty	115	115	100.00%
Active__c	No		115	1	0.86%
	Yes		115	13	11.30%
		empty	115	101	87.82%
BillingCountryCode	AU		115	3	2.60%
	BD		115	1	0.86%
	BR		115	1	0.86%
	CA		115	5	4.34%
	FR		115	1	0.86%
	DE		115	1	0.86%
	LK		115	1	0.86%
	GB		115	5	4.34%
	=US=		115	85	73.91%
		empty	115	12	10.43%
BillingGeocodeAccuracy	Address		115	27	23.47%
	Block		115	7	6.08%
	Street		115	1	0.86%
	Zip		115	21	18.26%
		empty	115	59	51.30%
BillingStateCode	AB		115	2	1.73%
	AZ		115	3	2.60%
	CA		115	90	78.26%

OK Next

Last Activity Date

The Last Activity Date report allows an administrator to select a set of Dashboard, Report, or Email Template records. The set can include all records, records chosen by name, or records selected with a filter. Then the report calculates when each Dashboard, Report, or Email Template was first created and most recently used. This information can be used to weed out old and stale assets that are clogging up your org. Any Dashboard, Report, or Email Template that has not been used in years is also likely to contain inaccurate information.

Reports have information about last run date. Dashboard have information about Last Refresh Date. Email Templates have information about Last Used Date and the number of Times Used. All of these objects have Created Date and Last Modified Date. All of these dates are used to calculate the First Activity and the Last Activity dates on the right-hand side of the report. Taken together, an administrator can use this information to figure out which the old assets should be deleted.

Last Activity Date For Production (Username: newss@df.com)

Select ObjectsPreview ReportDisplay ReportSchedule Report

Right-click the table to export the report in a variety of formats.

Last Activity Date for Object Dashboard

Object Name	Record ID	Folder	Namespace	Created By	Last N
Snapshot Push Actions	01Zi0000000aef0EAA	Snapshot Push Actions Dashboard		newss@df.com (SnapShot Demo)	newss@df.com
DocuSign for Salesforce	01Zi0000000id4IEAA	DocuSign Dashboard	dsfs	newss@df.com (SnapShot Demo)	newss@df.com
Service Executive Overview	01Zi0000000VWPTEA4	Best Practice Service Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Sales Executive Dashboard	01Zi0000000VWPWEA4	Example Sales and Marketing Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Marketing Executive Dashboard	01Zi0000000VWPVEA4	Example Sales and Marketing Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Service KPIs	01Zi0000000VWPUA4	Best Practice Service Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Salesperson Dashboard	01Zi0000000VWPYEA4	Example Sales and Marketing Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Sales Manager Dashboard	01Zi0000000VWPXEA4	Example Sales and Marketing Dashboards		newss@df.com (SnapShot Demo)	newss@df.com
Agent Supervisor Overview	01Zi0000000VWPSEA4	Best Practice Service Dashboards		newss@df.com (SnapShot Demo)	newss@df.com

Last Activity Date for Object Report

Object Name	Record ID	Folder	Namespace	Created By	
All Unsuccessful Changes Today By User	000i0000003BXnqEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage:# pushes this month by week by src	000i0000003BXnzEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage: # of pushes this month by week	000i0000003BXnyEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage:# of pushes this month by type	000i0000003BXnxEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage:# of pushes this month by success	000i0000003BXnwEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage: # pushed this month by week	000i0000003BXnvEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Today's Changes by Type	000i0000003BXnuEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Today's Changes With Details	000i0000003BXntEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Usage: # pushes this month by wk by user	000i0000003BXnsEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
Asset Pushes This Month By Success	000i0000003BXnrEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	
All Changes Made Today By User	000i0000003BXnmEAG	Snapshot Push Actions		newss@df.com (SnapShot Demo)	

OKNext

Apex Code Coverage

The Apex Code Coverage report allows an administrator to select any number of test classes on the Select Apex Tests tab, and then see all of the test results on the Display Report tab. The Code Coverage tab displays the line by line coverage details for the Apex Tests, Apex Classes, and Apex Triggers in the report. Lastly, the Schedule Report tab can be used to automate this report, and conditionally send the report out only if Low or Medium coverage is detected.

The Select Apex Tests tab can be used to examine the effect of running a single test class. The Apex Classes and Triggers that are covered will be displayed, and the coverage results will be detailed. You can also select multiple Test Classes to run, and see the aggregate results on the Display Report tab. This is useful if you want to focus on a group of classes and see their code coverage without running other tests. If all Apex Tests are selected, then the Display Report tab shows the Apex Classes and Triggers that are covered, but also includes other Classes and Triggers which are not covered by any test class.

The Manage Coverage button at upper right allows an administrator to edit the code coverage levels used for report colorization and the conditional threshold. The use case here is that a development team can set up the report to watch a set of Apex Classes and Triggers they are working on. If the nightly code coverage for any script falls below the desired standard, then they are automatically notified. The report could also be run on a production org and document compliance with code coverage standards after each metadata update.

Apex Code Coverage For Production (Username: newss@df.com)

Select Apex Tests | Display Report | **Code Coverage** | Schedule Report

☒ Hide Methods ☒ Hide Lines ☒ Hide Messages ☒ Color Coding Manage Coverage

Right-click the table to export the report in a variety of formats.

Result	Time	Type	Asset Name	Total Locations	Not Covered	Covered	Not Covered %	Covered %
Success	17 ms	Test	MyProfilePageControllerTest					
Success	99 ms	Test	MyProfilePageControllerTest					
Success	14 ms	Test	SiteLoginControllerTest					
Success	15 ms	Test	SiteRegisterControllerTest					
Failure	42 ms	Test	SetActiveWhenNewAccountCreates_Test					
Coverage		Class	ChangePasswordController	6	0	6	0.00%	100.00%
Coverage		Trigger	chatter_answers_question_escalation_to_case_trigger	18	12	6	66.66%	33.33%
Coverage		Class	ChatterAnswers	4	0	4	0.00%	100.00%
Coverage		Class	ChatterAnswersAuthProviderRegistration	31	31	0	100.00%	0.00%
Coverage		Class	CommunitiesLandingController	3	2	1	66.66%	33.33%
Coverage		Class	CommunitiesLoginController	5	0	5	0.00%	100.00%
Coverage		Class	CommunitiesSelfRegConfirmController	1	0	1	0.00%	100.00%
Coverage		Class	CommunitiesSelfRegController	39	9	30	23.07%	76.92%
Coverage		Class	ConcurrentSessionsPolicyCondition	26	26	0	100.00%	0.00%
Coverage		Class	DataLoaderLeadExportCondition	11	11	0	100.00%	0.00%
Coverage		Class	ForgotPasswordController	9	1	8	11.11%	88.88%
Coverage		Class	MyContactListController	4	4	0	100.00%	0.00%
Coverage		Class	MyProfilePageController	41	5	36	12.19%	87.80%
Coverage		Class	MyScheduledClass	1	1	0	100.00%	0.00%
Coverage		Class	SiteLoginController	6	0	6	0.00%	100.00%
Coverage		Class	SiteRegisterController	27	5	22	18.51%	81.48%
Summary	649 ms			232	107	125	46.12%	53.87%

OK Next

Record Level Security

The Record Level Security report examines a set of records from any Standard or Custom Object. The set can include all records, records chosen by name, or records selected with a filter. Then the report calculates which users have access to each record, what kind of access, and the reason why.

Because some large orgs have many thousands of users, the report details access by Profile, Permission Set, Sharing Rule, Object Ownership, Group Membership, and Role Membership. The Preview Report tab allows an individual record to be selected and will interactively display the entire set of users with access to that record, along with a more detailed reason as to why access was granted.

The value of this report for security and compliance can't be overstated. Any object that contains sensitive information can be analyzed. The set of people with access to that object are displayed. If one particular record has been compromised, then the entire set of users with access to that specific record will be generated. Instead of wading through the sharing rules, permission sets, manual shares, and role hierarchy at your company, this report provides a machine generated method of verifying and explaining object visibility across any group of users.

Record Level Security For Sandbox One (Username: person1@metazoa.com)

Select Objects
Preview Report
Display Report
Schedule Report

Sort By Name
Select a menu item to sort the table.
Color Coding

Right-click the table to export the report in a variety of formats.

Record Level Security for Object criteria_visible__c

Object Name	Record ID	Users	Access	Reason
All Records	All Records	With Profile (Admin)	Full Access	Admin
All Records	All Records	With Profile (Custom Profile)	Full Access	Admin
All Records	All Records	With Profile (Special Profile)	Full Access	Admin
Created by Person 1	a091W00000eRWV6QAO	person1@metazoa.com (Tim Barnes)	Full Access	Owner
Created in Eastern Region	a091W00000eRWVLQA4	person3@metazoa.com (Karen Logan)	Full Access	Owner
Created in Western Region	a091W00000eRWYcQAO	In Role (Eastern Region)	Read Only	Rule
Created in Western Region	a091W00000eRWYcQAO	person2@metazoa.com (Bob Smith)	Full Access	Owner
Created with Shareme	a091W00000eRWVaQAO	In Group (special_group)	Read Only	Rule
Created with Shareme	a091W00000eRWVaQAO	person3@metazoa.com (Karen Logan)	Full Access	Owner

Record Level Security for Object manual_visible__c

Object Name	Record ID	Users	Access	Reason
All Records	All Records	With Profile (Admin)	Full Access	Admin
All Records	All Records	With Profile (Custom Profile)	Full Access	Admin
All Records	All Records	With Profile (Special Profile)	Full Access	Admin
created by person 3	a041W00000Yr513QAB	person3@metazoa.com (Karen Logan)	Full Access	Owner
created by person 4	a041W00000Yr518QAB	person4@metazoa.com (Suzy Jones)	Full Access	Owner
created by person 5	a041W00000Yr511QAR	person5@metazoa.com (Bill Anderson)	Full Access	Owner
shared with person 2	a041W00000Yr4oGQAR	In Role And Subordinates (Western Region)	Read Only	Manual
shared with person 2	a041W00000Yr4oGQAR	person1@metazoa.com (Tim Barnes)	Full Access	Owner
shared with person 3	a041W00000Yr4oaQAB	In Group (special_group)	Read Only	Manual

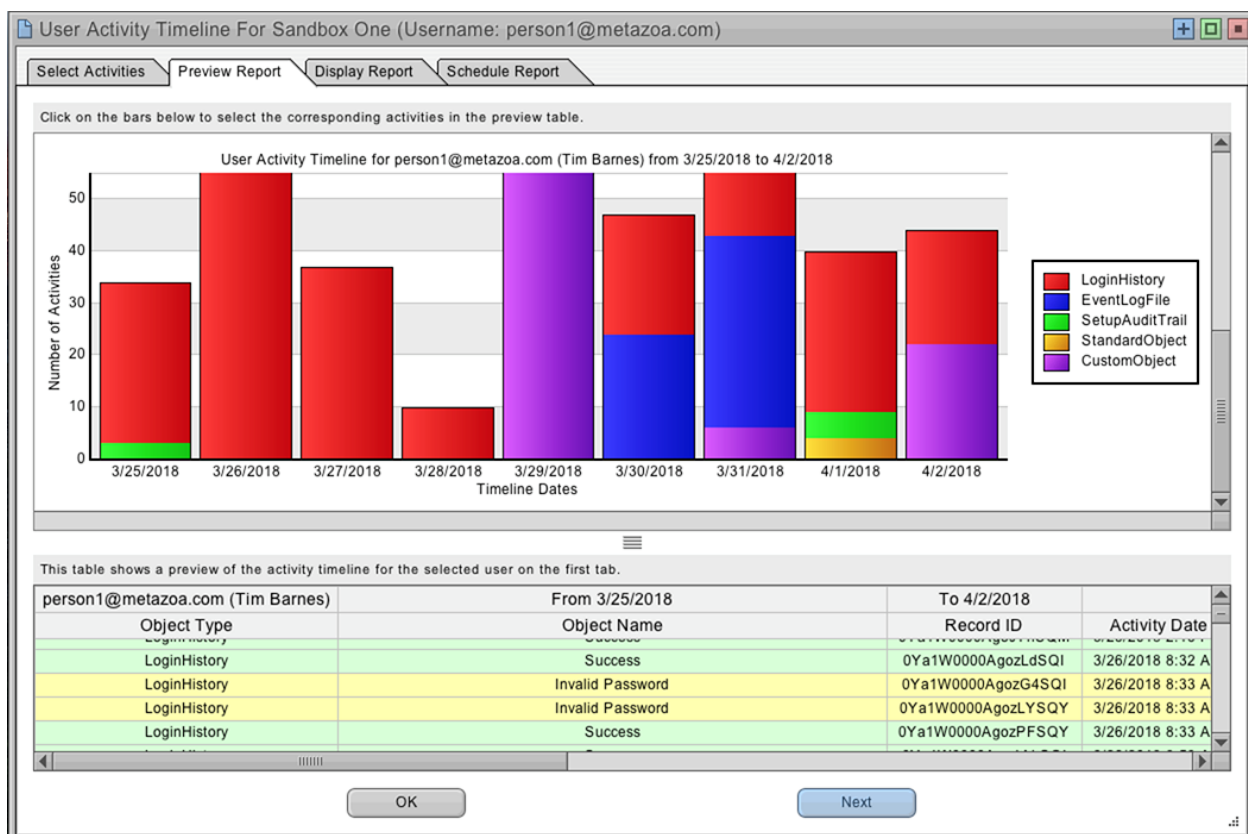
OK
Next

User Activity Timeline

The User Activity Timeline report shows all of the activities that a given user performed during a specified time frame. This report mines information from many different Salesforce objects and systems in order to paint a complete picture of user activity. This information can be used to monitor user activities and trigger alerts if problems are detected, or the report can be used forensically to investigate an incident in the past for security or governance purposes. The User Activity Timeline report is a key security capability for any Salesforce org.

An administrator can select different Objects for the report, a group of Users, and a start and stop date for the timeline. The Objects include the EventLogFile, LoginHistory, SetupAuditTrail, Standard Objects, and Custom Objects. The EventLogFile is a special capability that must be purchased from Salesforce. This Object has over 40 different types of event logs, including data exfiltration information. The LoginHistory Object documents user logins and failed attempts. The SetupAuditTrail Object records over 40 different types of administrative user actions performed with the Setup Menu. The Standard and Custom Objects show when the user created or last modified an Object during the time frame.

An administrator can set the risk level of each activity to Low, Medium, or High. If any activity exceeds the threshold, a report is sent out documenting the user activity for the given time frame. The use cases here are compelling. The activities of a troubled employee can be monitored before and after termination. The activities of an employee that leaves unexpectedly can be evaluated in retrospect. This report can also be used to keep a watchful eye on any external consultant or developer with org access.



Security Health Check

The Security Health Check is the same as the Salesforce report available in the Setup Menu. However, this report can be scheduled, and trigger exceptions if a Medium Risk or High Risk event is detected. If an unacceptable security problem is detected after metadata changes then an administrator can be alerted to the problem automatically.

Security Health Check For Sandbox One (Username: person1@metazoa.com)

Select Security Group Display Report Schedule Report

☐ Hide Low Risk
 ☐ Hide Medium Risk
 ☐ Hide High Risk
 ☒ Color Coding

Right-click the table to export the report in a variety of formats.

Security Group	Security Setting	Standard Value
CertificateAndKeyManagement	Certificate Expiration	
CertificateAndKeyManagement	Key Size	
FileUploadAndDownloadSecurity	Number of security risk file types with Hybrid behavior	0 security risk file types with Hy
LoginAccessPolicies	Administrators Can Log in as Any User	
PasswordPolicies	Password question requirement	Cannot cont
PasswordPolicies	Lockout effective period	
PasswordPolicies	Maximum invalid login attempts	
PasswordPolicies	Enforce password history	3 passwords
PasswordPolicies	Minimum password length	
PasswordPolicies	Obscure secret answer for password resets	
PasswordPolicies	Password complexity requirement	Must mix alpha, numeric, and spec
PasswordPolicies	Require a minimum 1 day password lifetime	
PasswordPolicies	User passwords expire in	
RemoteSiteSettings	Remote Site Settings	No remote sites with the Disable Protocol Security of
SessionSettings	Enable clickjack protection for non-Setup Salesforce pages	
SessionSettings	Enable clickjack protection for Setup pages	
SessionSettings	Enable Content Security Policy protection for email templates	
SessionSettings	Enable CSRF protection on GET requests on non-setup pages	
SessionSettings	Enable CSRF protection on POST requests on non-setup pages	
SessionSettings	Enable the SMS method of identity verification	
SessionSettings	Require identity verification during two-factor authentication registration	
SessionSettings	Require secure connections (HTTPS)	
SessionSettings	Session Timeout	

OK Next

Profiles and Permission Sets

The Profiles and Permission Sets report shows all of your Profiles or Permission Sets down the left-hand column and the selected metadata sub types across the top. The sub types include: Apex Page Accesses, Apex Page Accesses, Application Visibility, Field Permissions, Layout Assignments, Object Permissions, Record Type Visibility, Tab Visibility, User Permissions, and Custom Permissions.

These reports document all of the characteristics of your Profiles and Permission Sets in a single easy to read tabular report. Looking down any column will show the permissions for a single metadata asset by Profile or Permission Set. Reading across any row will show the permissions for a single Profile or Permission Set by each metadata asset. The report can be saved either in HTML, PDF, or CSV. As usual, all of these reports can be scheduled and automated for archive or email purposes.

Profiles And Permission Sets For Production (Username: newss@df.com)

Select Profiles and Permission Sets | Display Report | Schedule Report

Check the boxes below to include a

- ▼ Profiles
 - ☐ Apex Class Accesses
 - ☐ Apex Page Accesses
 - ☐ Application Visibility
 - ☐ Field Permissions
 - ☐ Layout Assignments
 - ☒ Object Permissions
 - ☐ Record Type Visibility
 - ☐ Tab Visibility
 - ☐ User Permissions
 - ☐ Custom Permissions
- ▼ Permission Sets
 - ☐ Apex Class Accesses
 - ☐ Apex Page Accesses
 - ☐ Application Visibility
 - ☐ Field Permissions
 - ☐ Object Permissions
 - ☐ Record Type Visibility
 - ☐ Tab Visibility
 - ☐ User Permissions
 - ☐ Custom Permissions
- ▼ Combined Security
 - ☐ Apex Class Accesses
 - ☐ Apex Page Accesses
 - ☐ Application Visibility
 - ☐ Field Permissions

This table shows a preview of the selected profile or permission set.

Object Permissions	A_DX_Object_c	Account	Account_Custom_Settings_c
Admin	Full Access	Full Access	No Access
Chatter External User	No Access	No Access	No Access
Chatter Free User	No Access	No Access	No Access
Chatter Moderator User	No Access	No Access	No Access
ContractManager	No Access	Create, Delete, Edit, Read	No Access
Cross Org Data Proxy User	No Access	Read	No Access
Custom: Chatter External	No Access	No Access	No Access
Custom: Chatter Free	No Access	No Access	No Access
Custom: Contract Manager	No Access	Create, Delete, Edit, Read	No Access
Custom: Contract Manager2	No Access	Create, Delete, Edit, Read	No Access
Custom: Contract Manager3	No Access	Create, Delete, Edit, Read	No Access
Custom: Contract Manager4	No Access	Create, Delete, Edit, Read	No Access
Custom: Contract Manager5	No Access	Create, Delete, Edit, Read	No Access
Custom: Cross Org Data Proxy User	No Access	Read	No Access
Custom: Cross Org Data Proxy User2	No Access	Read	No Access
Custom: Cross Org Data Proxy User3	No Access	Read	No Access
Custom: Cross Org Data Proxy User4	No Access	Read	No Access
Custom: Cross Org Data Proxy User5	No Access	Read	No Access
Custom: Force.com - App User	No Access	Create, Delete, Edit, Read	No Access
Custom: Marketing Profile	No Access	Create, Delete, Edit, Read	No Access
Custom: Marketing Profile2	No Access	Create, Delete, Edit, Read	No Access
Custom: Marketing Profile3	No Access	Create, Delete, Edit, Read	No Access
Custom: Marketing Profile4	No Access	Create, Delete, Edit, Read	No Access

OK Next

Combined Security

The last section of the Profiles and Permission Sets dialog provides additional information about the Combined Security permissions granted to individual users. The administrator can select any set of Users in the org. The Users will be listed down the left-hand side of the report table. The metadata sub types are displayed across the top, just like the Profiles and Permission set reports.

The Combined Security report starts with the base Profile and then overlays the various Permission Sets assigned to each user. The combined permissions, shown at the bottom of each cell, represent the actual privileges that are being granted. Green cells show where the Permission Sets have changed the base Profile privileges, and Red cells show where the Permission Sets did not change anything.

In the example below, an administrator has selected the Combined Security Object Permissions report. The Profile assigned to user Josh Hyde does not grant any access to the Account object. But Josh has also been assigned three Permission Sets that overlay additional privileges. The Combined Security permissions shown that Josh actually has Create, Delete, Edit, and Read access to the Account Object.

Profiles And Permission Sets For Production (Username: newss@df.com)

Select Profiles and Permission Sets | Display Report | Schedule Report

Check the boxes below to include a

- ☒ Record Type Visibility
- ☒ Tab Visibility
- ☒ User Permissions
- ☒ Custom Permissions
- ▼ Permission Sets
 - ☒ Apex Class Accesses
 - ☒ Apex Page Accesses
 - ☒ Application Visibility
 - ☒ Field Permissions
 - ☒ Object Permissions
 - ☒ Record Type Visibility
 - ☒ Tab Visibility
 - ☒ User Permissions
 - ☒ Custom Permissions
- ▼ Combined Security
 - ☒ Apex Class Accesses
 - ☒ Apex Page Accesses
 - ☒ Application Visibility
 - ☒ Field Permissions
 - ☒ Object Permissions
 - ☒ Record Type Visibility
 - ☒ Tab Visibility
 - ☒ User Permissions
 - ☒ Custom Permissions
- ▼ Additional Reports
 - ☒ User Preferences

This table shows a preview of the selected profile or permission set.

Object Permissions	Account	Account_Custo
fftester@dreamfactory.com (Douglas Toelle)	Customer Portal Manager Standard (Edit, Read) Combined Security (Edit, Read)	Customer Portal Manager Combined Security
joshdev@metazoa.com (Josh Hyde)	Custom: Standard User (No Access) Set_User_Perm (Read) Account_Object_Manipulation (Create, Read) Account_Object_Manipulation_2 (Delete, Edit, Read) Combined Security (Create, Delete, Edit, Read)	Custom: Standard Combined Security
newss@df.com (SnapShot Demo)	Admin (Full Access) Account_RW (Full Access) Combined Security (Full Access)	Admin (No Combined Security)

OK Next

Conclusion

This whitepaper has discussed some of the common ways that companies use Snapshot to enhance compliance, governance, and security on the Salesforce platform. Snapshot provides a best-of-breed solution to enable effective release management through streamlined deployments. Over two dozen reports are available to improve compliance, governance, and security at any company.

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