

# Automated Documentation

The purpose of setting up automated documentation is to understand and communicate the current state of the org and the work being done.

There are 7 built-in reports available, with an additional 2 reports that can be run separately:

- **Object Report**  
Lists high level descriptions/information, relationships, fields, field-sets, validation rules and other object specific information.
- **Code Reports**  
Integrated in ApexDoc documentation
- **Matrix Reports**  
Spreadsheets demonstrating access across Profile / Permission Sets across a range of information. (CRUDMV/Field/Record Type,Page,Class,Layout,etc.)
- **Workflow Reports**  
Collection of all workflows linked by their actions (Email, Outbound messages, Field Updates, etc) for easier consumption.
- **Workbook Reports**  
Object information shown within a spreadsheet for easier massaging / integrating with other systems.
- **Change Report**  
Collection of changes in Version Control since the last checkin (start of sprint/project) to describe what is needed on the next deploy.
- **Profile Report**  
Break down of profiles by various information. Similar to the Matrix Reports, but within an HTML page.

Additionally there are also the: \* **Unversioned Changes** - list of changes NOT in version control. \* **Phabricator reports** - available for monitoring automated Code Reviews

**Please see below for screenshots of each of these reports**

Please note, all objects / classes within the package are included within the reports. To narrow these down to specific projects / sets, simply replace the src/package.xml file with what should be documented.

It is recommended that it is set to always run on a scheduled basis (such as on a Continuous Integration server - such as Jenkins) so it can be integrated with other work (such as after each successful deploy) and accessible to everyone.

While Version Control also is worthwhile in its own right, we also highly recommend it is used in conjunction with the Automated documentation. This provides better insight into:

- the changes made since the last checkin (beginning of sprint or project, etc)
- monitoring of changes made
- a real-time running tally of items needed for the next deploy.

As these are available through Jenkins, the reports are:

- Available on a Push Button / Scheduled basis
- Flexibility to either document current metadata or only code from version control
- Accessible through a browser without any end-user setup
- Extensible to report on nearly anything available in metadata.

## Report Screenshots

### Object Report

Lists high level descriptions/information, relationships, fields, field-sets, validation rules and other object specific information.

Object Report

Home
Reports
Sections

Top
General
Relationships
Fields

# THDP\_Vendor\_Color\_\_c (THDP Vendor Color)

Contains the unique set of all Vendor named Colors to be used within the Color Center experience.

## General

Type	Is Enabled
Activities	false
Enhanced Lookup	true
enableFeeds	false
enableHistory	false
enableReports	true

## Relationships

Type	Label	API	Reference To	Relationship Name	Required
Lookup	Color Family	Color_Family__c	<a href="#">THDP_Color_Family__c</a>	Paint_Vendor_Colors	false
Lookup	Paint Vendor	Paint_Vendor__c	<a href="#">THDP_Vendor__c</a>	Paint_Vendor_Colors	false

Object Report
Code Report
Matrix Report
Workbook Report
Profile Report
Change Report

Spreadsheets demonstrating access across Profile / Permission Sets across a range of information. (CRUDMV/Field/Record Type,Page,Class,Layout,etc.)

A	B	C	D
Profile Name	Type	THDP_Attribute__c	THDP_Color_Family__c
THD Paint Color Profile	Profile	_R__	_R__
THDP Paint Color Admin	Profile	CRUDMV	CRUDMV
THD Paint Admin Permissions	PermissionSet	CRUDMV	CRUDMV

Profile Name	Type	THDP_Attribute__c.Attribute_Description__c
THD Paint Color Profile	Profile	read
THDP Paint Color Admin	Profile	read/write
THD Paint Admin Permissions	PermissionSet	read/write

Profile Name	Type	Account.Business_Account
THD Paint Color Profile	Profile	FALSE
THDP Paint Color Admin	Profile	TRUE
THD Paint Admin Permissions	PermissionSet	FALSE

## Workflow Reports

Collection of all workflows linked by their actions (Email, Outbound messages, Field Updates, etc) for easier consumption.

# Account

## Inactive Rules

### • DONT\_DELETE\_ME

Talk to Jim. This is his call.

**If the following is true:** (onCreateOnly in 30 Days)

```
OR(
    if( AccountNumber = '10103' || AccountNumber == '10203',
        true, false
    )
)
```

**The following is performed:**

- Alert - [Bad\\_Email](#)
- FieldUpdate - [Bad\\_Field\\_Update](#)
- OutboundMessage - [Bad\\_Outbound](#)
- Task - [Bad\\_Account\\_Entered](#)

Inactive Workflows

[DONT\\_DELETE\\_ME](#)

Alerts

[Bad\\_Email](#)

Field Updates

[Bad Field Update](#)

Outbound Messages

[Bad Outbound](#)

Tasks

[Bad Account Entered](#)

## Workbook Reports

Object information shown within a spreadsheet for easier massaging / integrating with other systems.

## Account

### General

Type	Is Enabled
Activities	
Enhanced Lookup	
enableFeeds	TRUE
enableHistory	FALSE
enableReports	

### Relationships

API	Label	Reference To	Type	Relationship Name
DandbCompanyId			lookup	
OwnerId			lookup	

### Fields

Field Name	Label	Comments	Data Type	Options
AccountSource			Picklist	Web Phone Inquiry Partner Referral Purchased List Other
Active_c	Active		Picklist	No Yes
CustomerPriority_c	Customer Priority		Picklist	High Low Medium
DandbCompanyId			lookup -	
Dont_Delete_Me_c	Dont Delete Me		Text[255]	

## Change Report

Collection of changes in Version Control since the last checkin (start of sprint/project) to describe what is needed on the next deploy.

```
# # # # # # # # # # # # # # #
Files changed
FROM: 19541637b0a2cf35dfac40327c0281d571863174
TO : 6a5fa8ea80c3108a58cad06410fed65728b7ea40
# # # # # # # # # # # # # # #
```

```
classes/ToDoAppCtrl.cls
classes/pb_BlogCtrl.cls
layouts/CollaborationGroup-Group Layout.layout
layouts/FeedItem-Feed Item Layout.layout
objects/Account.object
package.xml
pages/ToDoApp.page
pages/pb_Blog.page
pages/pb_TestLocalChanges.page
permissionsets/ToDoApp.permissionset
profiles/Admin.profile
profiles/Field Rep.profile
profiles/Standard.profile
profiles/StandardAul.profile
staticresources/GruntResource.resource
staticresources/ToDoAppSrc.resource
staticresources/pb_Foundation.resource
```

```
# # # # # # # # # # # # # # #
All Documentated Metadata Changes
FROM: 19541637b0a2cf35dfac40327c0281d571863174
TO : 6a5fa8ea80c3108a58cad06410fed65728b7ea40
# # # # # # # # # # # # # # #
```

```
commit b1fa2d038a5f8f6ba6a10e29e9fc32ac94c87147
Author: Paul Roth <proth@salesforce.com>
Date: Thu Dec 18 14:53:50 2014 -0600
```

UPDATE: add in example request for todo-min and vendor-min within the page.

```
src/pages/ToDoApp.page | 5 +++++
src/staticresources/ToDoAppSrc.resource | Bin 261628 -> 537782 bytes
2 files changed, 5 insertions(+)
```