Automated Documentation

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

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 secheduled 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.

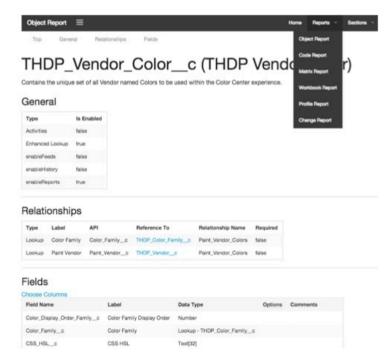
As these are available through Jenkins, the reports are:

- 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.



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.)

A	В	C	D	
Profile Name	Туре	THDP_Attributec	THDP_Color_Familyc	
THD Paint Color Profile	Profile	_R	_R	
THDP Paint Color Admin	Profile	CRUDMV	CRUDMV	
THD Paint Admin Permissions	PermissionSet	CRUDMV	CRUDMV	

Profile Name	Туре	THDP_Attributec.Attribute_Descriptionc
THD Paint Color Profile	Profile	read
THDP Paint Color Admin	Profile	read/write
THD Paint Admin Permissions	PermissionSet	read/write

Profile Name	Туре	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)

The following is performed:

- Alert Bad_Email
- FieldUpdate Bad_Field_Update
- OutboundMessage Bad_Outbound
- Task Bad_Account_Entered

Workbook Reports

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

Inactive Workflows

DONT_DELETE_ME

Alerts

Bad_Email

Field Updates

Bad Field Update

Outbound Messages

Bad Outbound

Tasks

Bad Account Entered

Account

General	100 Japan
Type	is Enabled
Activities	
Enhanced Lookup	
enableFeeds	TRUE
enableHistory	FALSE
enableReports	

Relationsh	ips			
API	Label	Reference To	Type	Relationship Name
DandbCompanyld			Lookup	
Ownerld			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
DandbCompanyld			Lookup -	
Dont_Delete_Mec	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.

```
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/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 b1fa2d038a5f8feba6a10e29e9fc32ac94c87147
Author: Paul Roth Poth@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
 src/staticresources/TodoAppSrc.resource | Bin 261628 -> 537782 bytes
2 files changed, 5 insertions(+)
```