



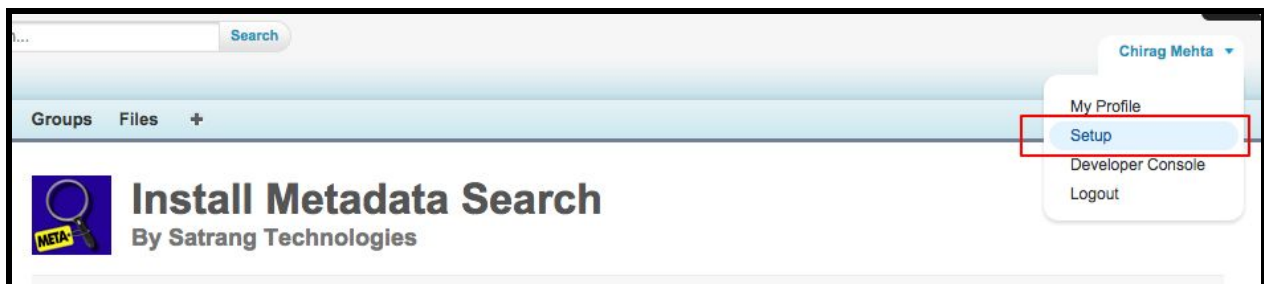
Metadata Search Configuration Guide

This configuration guide will walk you through the required steps to configure and start with the metadata search capability in 3 quick steps:

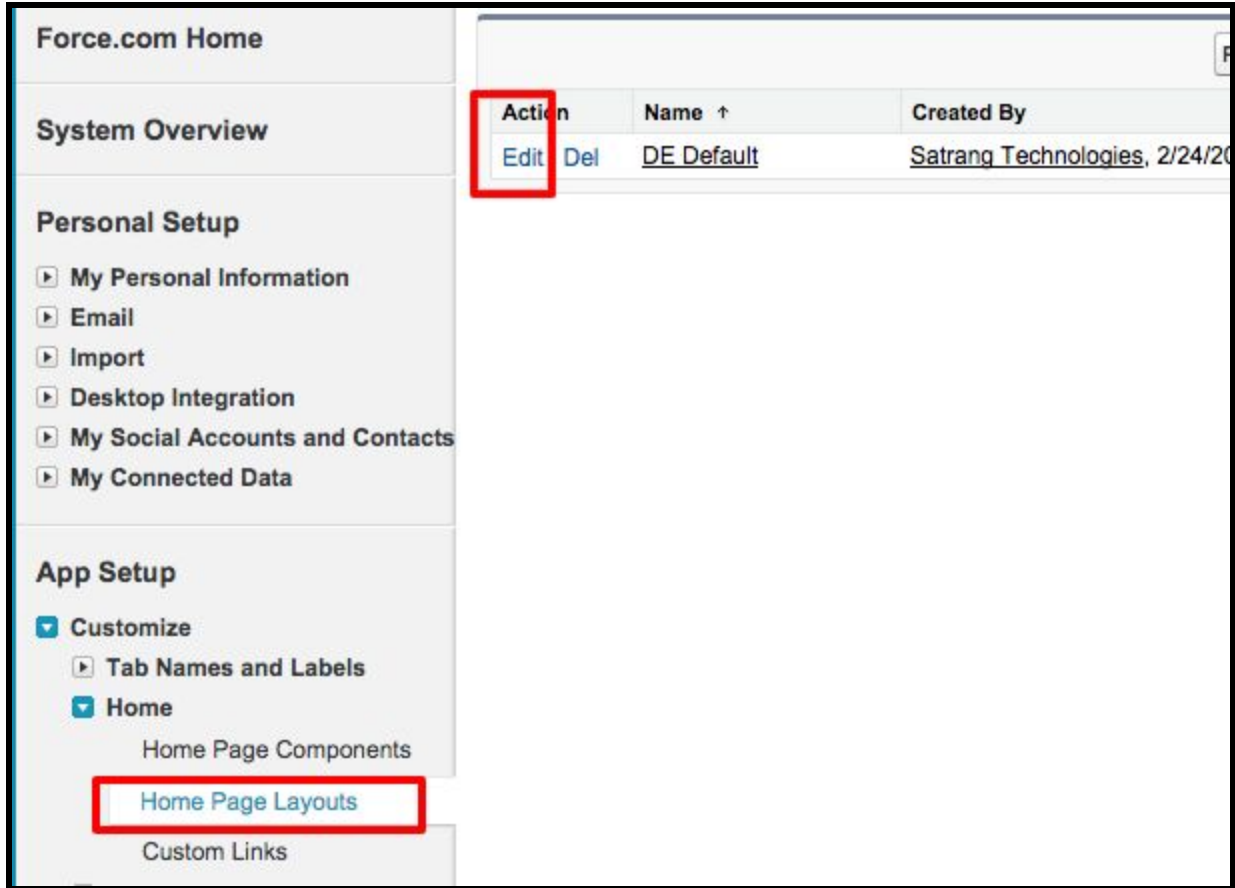
1. Navigation to App Setup.
2. Editing the Homepage Layout.
 - a. Enabling the ' **Quick Metadata Search** ' Home Page Component.
 - b. Reordering the components.
 - c. Modifying your Organization's user interface settings for the Sidebar component.
3. Testing the dry-run of the Metadata Search application.

1. Navigation to App Setup

- i. Navigate to **Setup** page.



- ii. From Setup, click [App Setup](#) > [Customize](#) > [Home](#) > [Home Page Layouts](#).



2. Editing the Homepage Layout

- i. Click on the **Edit** button to edit the homepage layout.

a. Enabling the 'Quick Metadata Search' Home Page Component

- i. Select the **Quick Metadata Search** checkbox to enable the Quick Metadata search component on the home page.
- ii. Click **Next**.

Edit Home Layout

Step 1. Select the components to show

Choose the components to include on your home page layout.

Layout Name

Select Wide Components to Show

Items to Approve Calendar
 Tasks Dashboard Snapshot

Select Narrow Components to Show

Sidebar Search Create New...
 Document Search Recent Items
 Solution Search Messages & Alerts
 Product Search Custom Links
 Tags Customer Portal Welcome
 Quick Metadata Search Metadata Search

This component is Deprecated, don't use this one.

b. Reordering the components

- i. On this screen, you can now specify Order of components ie where you want the Quick Metadata Search component to appear.
- ii. Click Save when you are done.

Edit Home Layout

Step 2. Order the components

Arrange the components on your home page.

Narrow (Left) Column

Quick Metadata Search

Create New...

Recent Items

Wide (Right) Column

--None--

Top

Up

Down

Bottom

Top

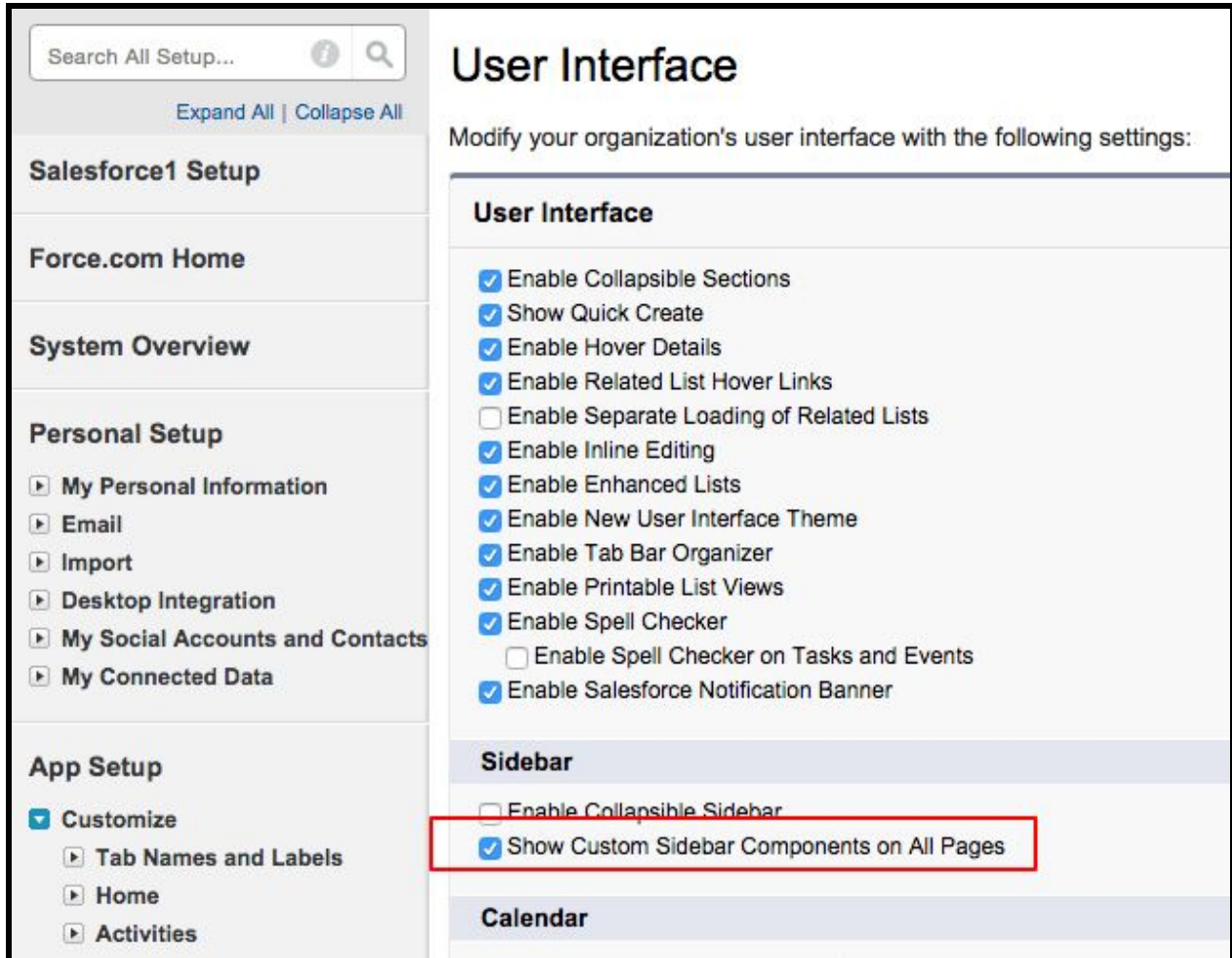
Up

Down

Bottom

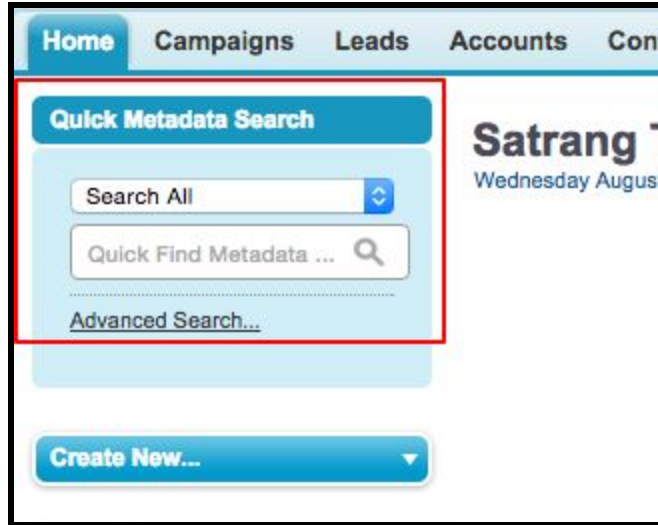
c. [Modifying your Organization's user interface settings for the Sidebar component](#)

- i. From Setup, click [Customize | User Interface](#).
- ii. On the User Interface page, scroll down to Sidebar section and select the checkbox **Show Custom Sidebar Components on All Pages**.
- iii. Click **Save**.

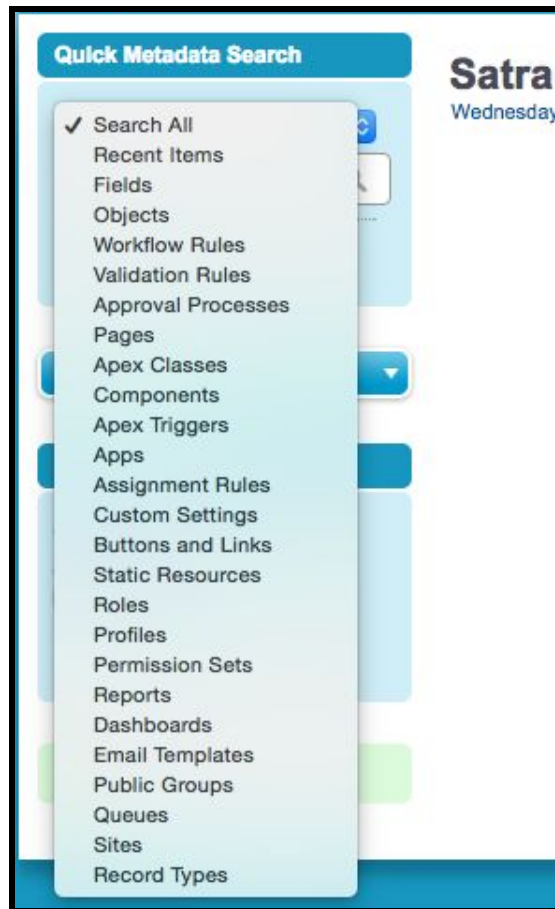


3. [Do a Dry Run to test the Metadata Search Application.](#)

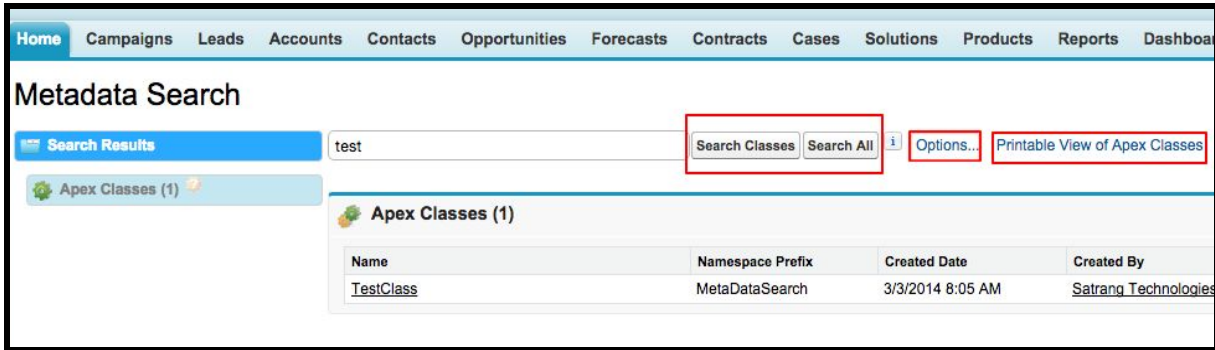
- Click on the **Home tab** or **any tab** with **sidebar**.
- You should be able to see the Quick Metadata Search custom component appear on the left hand side bar.



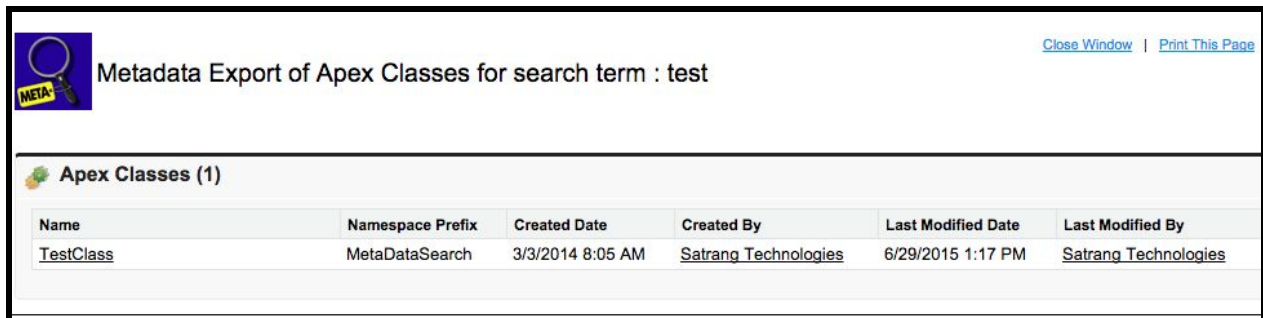
- From the drop down select what you want to search, you can search for example profiles, roles , permission sets etc. Enter the text you want to make a search for and press Enter.



- Search Result (i.e. the output). Lets say we searched “test” in “Apex Classes” category.



- A Metadata Search Result page will open up.
- On the left side components for which the search was made are listed.
- The actual search results will be displayed on the right side of the search page.
- Here you can change the search text and do a new search.
- Here ‘[Search Classes](#)’ will allow you to search classes only for new text.
- And ‘[Search All](#)’ will let you search the all the components against the mentioned search string.
- ‘[Printable View of Classes](#)’ will let you print/export your search results



Please Note:

The app comes with following as well:

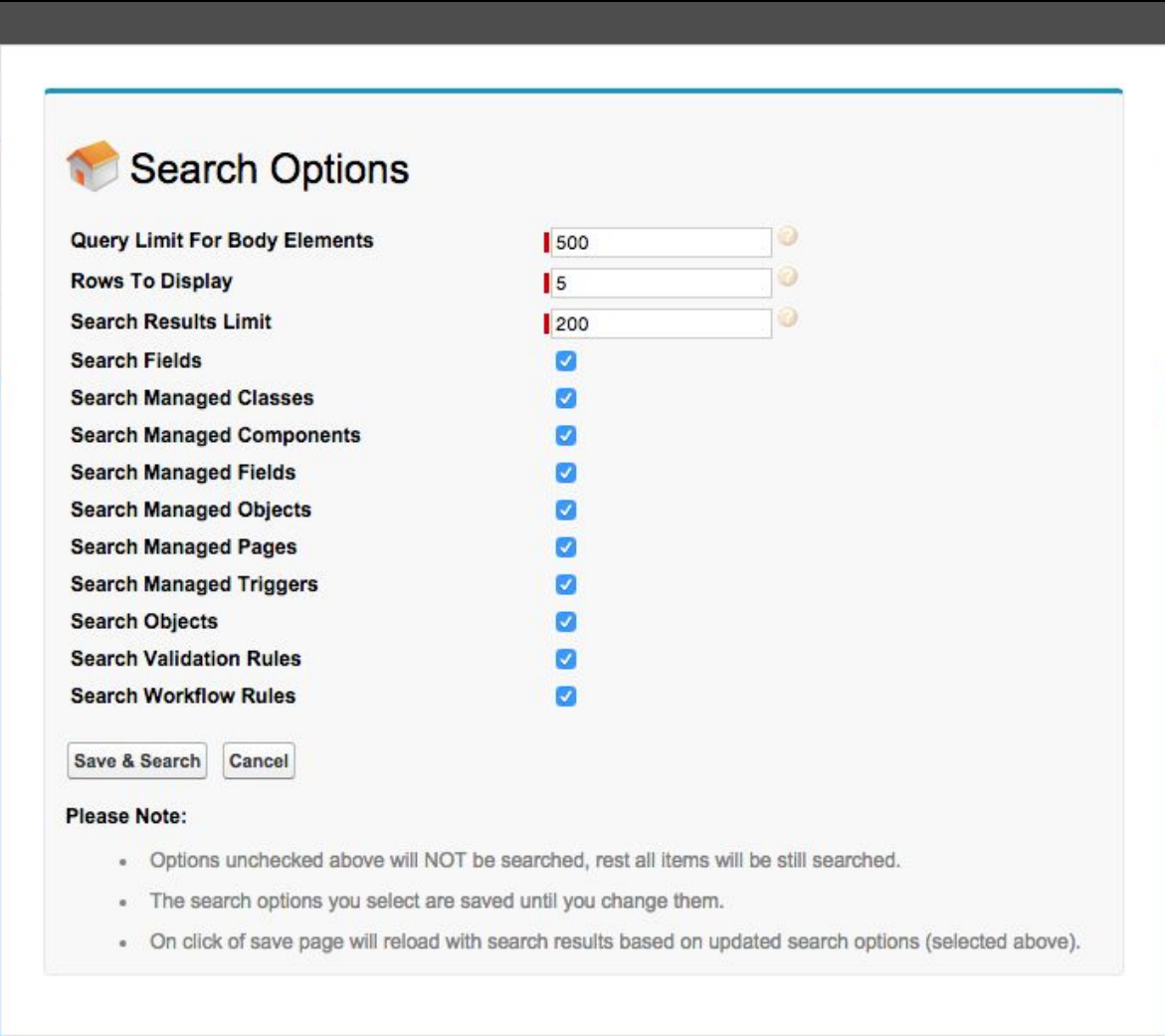
1. There’s also Metadata Search **Custom Tab**, please add (and enable) same in desired apps
2. There’s also Metadata Search **App**. Navigate to same (by selecting from top right corner) to quickly access Metadata Search

Support

- If you are still facing difficulty or need any assistance, we are just an email away. Email your queries/assistance requests/feedback at support@satrangtech.com

Additional Information

- You can set Search Options by clicking Options



The screenshot shows a dialog box titled "Search Options" with a house icon. It contains several configuration options:

Option	Value
Query Limit For Body Elements	500
Rows To Display	5
Search Results Limit	200
Search Fields	<input checked="" type="checkbox"/>
Search Managed Classes	<input checked="" type="checkbox"/>
Search Managed Components	<input checked="" type="checkbox"/>
Search Managed Fields	<input checked="" type="checkbox"/>
Search Managed Objects	<input checked="" type="checkbox"/>
Search Managed Pages	<input checked="" type="checkbox"/>
Search Managed Triggers	<input checked="" type="checkbox"/>
Search Objects	<input checked="" type="checkbox"/>
Search Validation Rules	<input checked="" type="checkbox"/>
Search Workflow Rules	<input checked="" type="checkbox"/>

At the bottom of the dialog, there are two buttons: "Save & Search" and "Cancel".

Please Note:

- Options unchecked above will NOT be searched, rest all items will be still searched.
- The search options you select are saved until you change them.
- On click of save page will reload with search results based on updated search options (selected above).

- Search Result (i.e. the output). Lets say we searched “test” in “All” category.

The screenshot shows the Salesforce Metadata Search interface. The search term "test" is entered in the search bar. The results are categorized into several sections:

- Recent Items (1):** A table with columns: Name, Type, E-mail, Active, Last Viewed Date, Last Referenced Date. Row: testprofile, Profile, 7/24/2014 1:31 PM, 7/24/2014 1:31 PM.
- Workflow Rules (1):** A table with columns: Active?, Object, Name, Filter / Criteria, Actions. Row: Account, test_update_field, Account.Name equals null, test_email_alert (Alert).
- Validation Rules (2):** A table with columns: Active?, Object, Name, Description, Error Condition Formula, Error Message. Rows: Lead, test_lead_validation_rule, City == "aapple", Please enter different city; Event, test_event, TRUE, Please enter value ..
- Approval Processes (3):** A table with columns: Process Name, Process State, Process Description, Step Name, Step Description, Process Created Date. Rows: Test Approval Process, inactive, Step 1, 8/14/2015 5:19 AM; Test Approval Process, inactive, Test Step 1, This is test step of approval process., 8/14/2015 5:19 AM; Test Approval Process, inactive, Test Step 2, This is test step of approval process., 8/14/2015 5:19 AM.
- Pages (2):** A table with columns: Name, Label, Namespace Prefix, Created Date, Created By, Last Modified Date, Last Modified By. Rows: MetadataSearchDemoinstructions, MetadataSearchDemoinstructions, 10/13/2014 9:48 AM, Satrang Technologies, 10/20/2014 12:43 AM, Satrang Technologies; test, test, 3/22/2013 8:12 AM, Satrang Technologies, 3/22/2013 8:15 AM, Satrang Technologies.
- Apex Classes (1):** A table with columns: Name, Namespace Prefix, Created Date, Created By, Last Modified Date, Last Modified By. Row: TestClass, MetaDataSearch, 3/3/2014 8:05 AM, Satrang Technologies, 6/29/2015 1:17 PM, Satrang Technologies.
- Static Resources (1):** A table with columns: Name, Cache Control, MIME Type, Created Date, Created By, Last Modified Date, Last Modified By. Row: testresource, Private, application/octet-stream, 2/24/2013 8:29 AM, Satrang Technologies, 2/24/2013 8:29 AM, Satrang Technologies.
- Roles (1):** A table with columns: Name, Last Modified Date, Last Modified By. Row: testrole, 2/24/2013 8:30 AM, Satrang Technologies.
- Profiles (1):** A table with columns: Name, Name, Last Modified Date, Last Modified By. Row: testprofile, Salesforce, 6/29/2015 1:17 PM, Satrang Technologies.
- Permission Sets (1):** A table with columns: Name, API Name, User License, Last Modified Date, Last Modified By. Row: test_permission_set, test permission set, Salesforce, 2/24/2013 8:31 AM, Satrang Technologies.
- Email Templates (1):** A table with columns: Name, Folder, Available For Use, Template Type, Last Modified Date. Row: test_email, Unified Public Email Templates, , Text, 2/24/2013 8:32 AM.
- Queues (1):** A table with columns: Name, Email, Created Date, Created By. Row: testqueue, 2/24/2013 8:28 AM, Satrang Technologies.

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● Printable View of keyword “test” in “All” category.

Metadata Export for search term : test [Close Window](#) | [Print This Page](#)

Recent Items (1)

Name	Type	E-mail	Active	Last Viewed Date	Last Referenced Date
testprofile	Profile		<input type="checkbox"/>	7/24/2014 1:31 PM	7/24/2014 1:31 PM

Fields (0)
No matches found.

Objects (0)
No matches found.

Workflow Rules (1)

Active?	Object	Name	Filter / Criteria	Actions
<input checked="" type="checkbox"/>	Account	test_update_field	Account.Name equals null	Immediate Actions: • test_email_alert (Alert)

Validation Rules (2)

Active?	Object	Name	Description	Error Condition Formula	Error Message
<input checked="" type="checkbox"/>	Lead	test_lead_validation_rule	This is test validation rule ...	City == "aspie"	Please enter different city
<input checked="" type="checkbox"/>	Event	test_event	This is test validation rule ...	TRUE	Please enter value ...

Approval Processes (3)

Process Name	Process State	Process Description	Step Name	Step Description	Process Created Date
Test Approval Process 1	Inactive		Step 1		8/14/2015 5:19 AM
Test Approval Process 1	Inactive		Test Step 1	This is test step of approval process.	8/14/2015 5:19 AM
Test Approval Process 1	Inactive		Test Step 2	This is test step of approval process.	8/14/2015 5:19 AM

Pages (2)

Name	Label	Namespace Prefix	Created Date	Created By	Last Modified Date	Last Modified By
MetadataSearchDemoInstructions	MetadataSearchDemoInstructions		10/13/2014 9:48 AM	Satraga Technologies	10/20/2014 12:43 AM	Satraga Technologies
test	test		3/22/2013 8:12 AM	Satraga Technologies	3/22/2013 8:15 AM	Satraga Technologies

Apex Classes (1)

Name	Namespace Prefix	Created Date	Created By	Last Modified Date	Last Modified By
TestClass	MetadataSearch	3/3/2014 8:05 AM	Satraga Technologies	6/29/2015 1:17 PM	Satraga Technologies

Components (0)
No matches found.

Apex Triggers (0)
No matches found.

Apps (0)
No matches found.

Assignment Rules (0)
No matches found.

Custom Settings (0)
No matches found.

Buttons and Links (0)
No matches found.

Static Resources (1)

Name	Cache Control	MIME Type	Created Date	Created By	Last Modified Date	Last Modified By
testresource	Private	application/octet-stream	2/24/2013 8:29 AM	Satraga Technologies	2/24/2013 8:29 AM	Satraga Technologies

Roles (1)

Name	Last Modified Date	Last Modified By
testrole	2/24/2013 8:30 AM	Satraga Technologies

Profiles (1)

Name	Name	Last Modified Date	Last Modified By
testprofile	Salesforce	6/29/2015 1:17 PM	Satraga Technologies

Permission Sets (1)

Name	API Name	User License	Last Modified Date	Last Modified By
test_permission_set	test_permission_set	Salesforce	2/24/2013 8:31 AM	Satraga Technologies

Reports (0)
No matches found.

Dashboards (0)
No matches found.

Email Templates (1)

Name	Folder	Available For Use	Template Type	Last Modified Date
test_email	Unfiled Public Email Templates	<input type="checkbox"/>	Text	2/24/2013 8:32 AM

Public Groups (0)
No matches found.

Queues (1)

Name	Email	Created Date	Created By
testqueue		2/24/2013 8:28 AM	Satraga Technologies

Sites (0)
No matches found.

Record Types (0)
No matches found.