

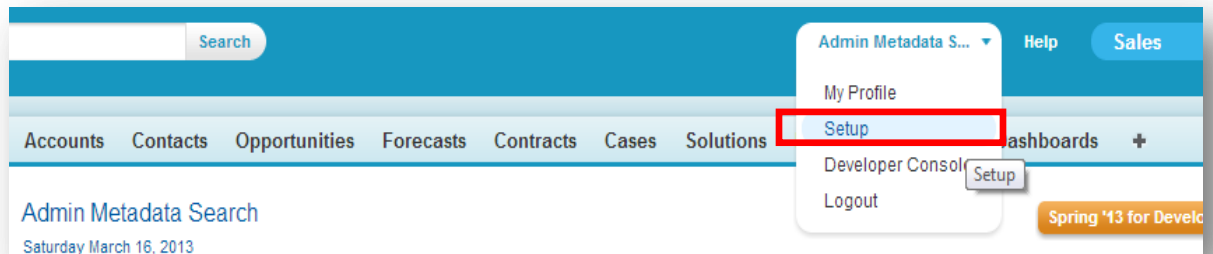
# Metadata Search Configuration Guide

This configuration guide will walk you through the required steps to configure and start with the metadata search capability in 7 quick steps:

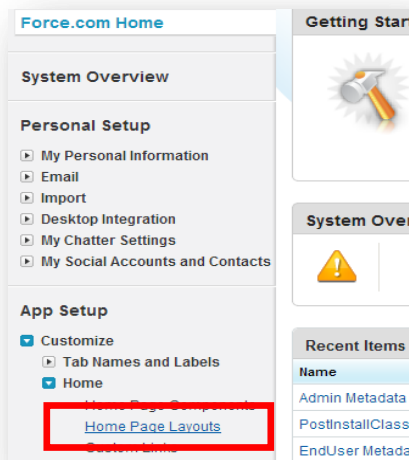
1. Navigation to App Setup
2. Editing the Home Page Layout
3. Enabling the 'Metadata Search' Home Page Component
4. Re-ordering the components
5. Adding the component to other tabs
6. Modifying your Organization's user interface settings for the Sidebar component
7. Do a Dry Run to test the Metadata Search Application.

## 1. Navigation to App Setup

- i. Navigate to **Setup** page



- ii. On the Setup page, navigate to **App Setup > Customize > Home > Home Page Layouts**.



- iii. Home Page Layouts detail page is displayed.

## 2. Editing the Home Page Layout

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

Home Page Layouts

This page allows you to create different tab layouts for the Home Tab.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P

Page Layout Assignment New

Action	Name ↑	Created By	Last Modified By
<b>Edit</b> Del	DE Default	Admin Metadata Search, 2/24/2013 12:47 AM	Admin Metadata Search

## 3. Enabling the 'Metadata Search' Home Page Component

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

Edit Home Layout Help for this Page ?

Step 1. Select the components to show Step 1 of 2

Choose the components to include on your home page layout.

Layout Name DE Default

Select Wide Components to Show I = Required Information

Items to Approve ☒ Calendar ☒  
Tasks ☒ Dashboard Snapshot ☐

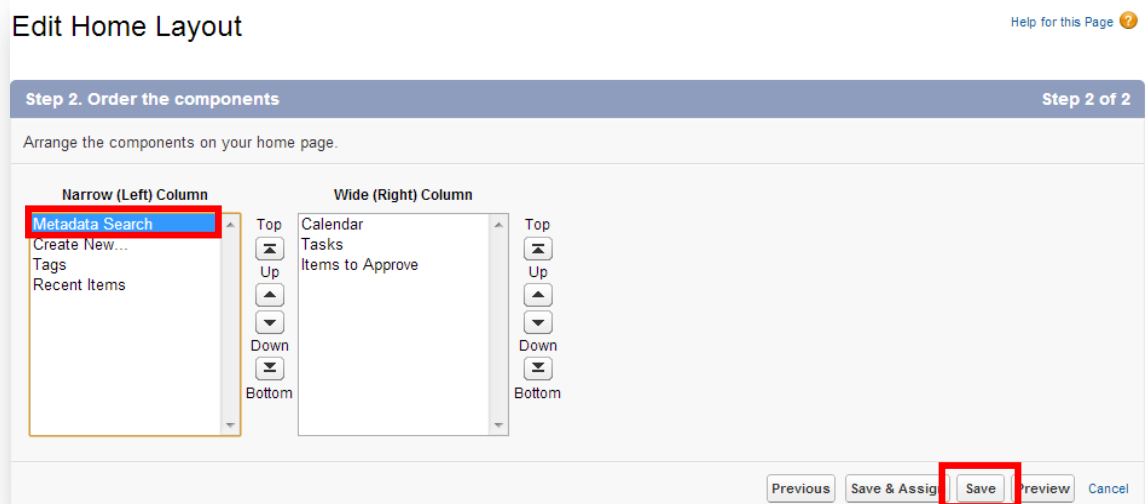
Select Narrow Components to Show

Create New... ☒ Recent Items ☒  
Messages & Alerts ☐ Custom Links ☐  
Tags ☒ Customer Portal Welcome ☐  
**Metadata Search ☒**

**Next** Cancel

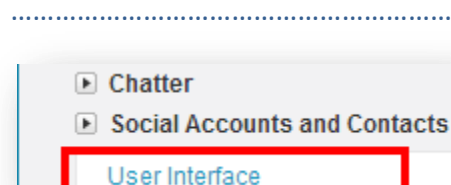
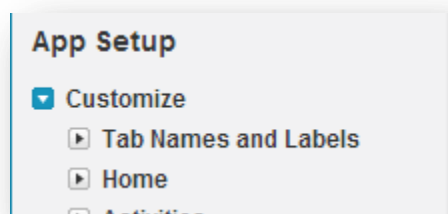
#### 4. Re-ordering the components

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



#### 5. Adding the component to other tabs

- i. To have the component show up on all of your Salesforce tabs, navigate to **App Setup > Customize > User Interface**.



## 6. Modifying your Organization's user interface settings for the Sidebar component

- i. On the User Interface page, scroll down to Sidebar section and select the checkbox **Show Custom Sidebar Components on All Pages**.
- ii. Click **Save**.

**User Interface**

Modify your organization's user interface with the following settings:

**User Interface**

- ☒ Enable Collapsible Sections
- ☐ Show Quick Create
- ☒ Enable Hover Details
- ☒ Enable Related List Hover Links
- ☐ Enable Separate Loading of Related Lists
- ☐ Enable Inline Editing
- ☒ Enable Enhanced Lists
- ☒ Enable New User Interface Theme

Some Salesforce features like Chatter need the new user interface theme. Disabling the theme disables Chatter.

**Sidebar**

- ☒ Enable Collapsible Sidebar
- ☒ **Show Custom Sidebar Components on All Pages**

**Calendar**

- ☒ Enable Home Page Hover Links for Events
- ☒ Enable Drag-and-Drop Editing on Calendar Views
  - ☒ Enable Click-and-Create Events on Calendar Views
  - ☐ Enable Drag-and-Drop Scheduling on List Views
- ☒ Enable Hover Links for My Tasks list

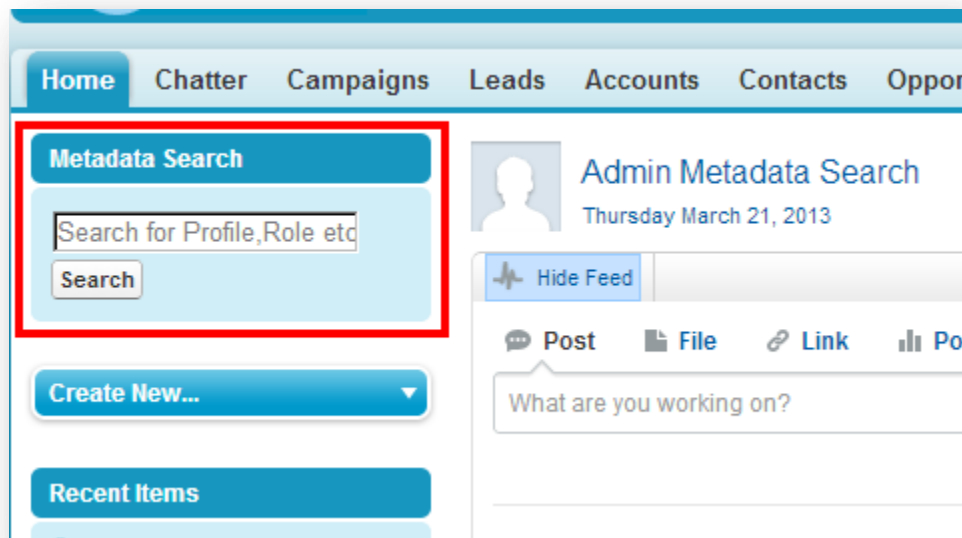
**Setup**

- ☒ Enable Enhanced Page Layout Editor
- ☒ Enable Enhanced Profile List Views
- ☐ Enable Enhanced Profile User Interface
- ☒ Enable Streaming API
- ☐ Enable Custom Object Truncate

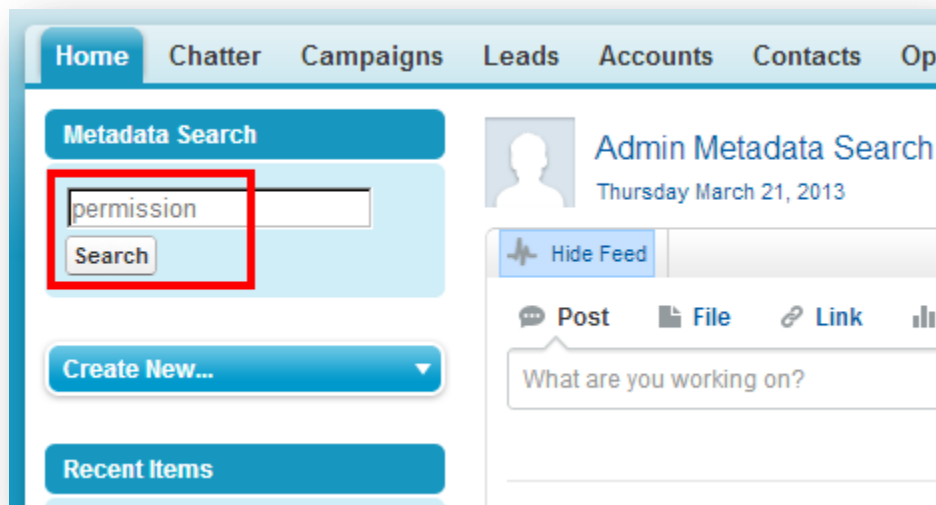
**Save** **Cancel**

## 7. Do a Dry Run to test the Metadata Search Application

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



- iii. Enter any search string (e.g. I want to search my developed code related to permission sets so I enter search string as 'permission')



iv. Search Result (i.e. the output)

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions Products Reports

## Metadata Search

**Search Results** permission  [i](#)

Pages (0)

**Apex Classes (1)**

Name	Created Date	Last Modified Date	Created By
<a href="#">PermissionSetManagerController</a>	3/21/2013 4:26 AM	3/21/2013 4:26 AM	<a href="#">Admin Metadata Search</a>

**Components (1)**

Name	Label	Created Date	Last Modified Date	Created By
<a href="#">PermissionSetManagerComponent</a>	PermissionSetManagerComponent	3/21/2013 4:26 AM	3/21/2013 4:50 AM	<a href="#">Admin Metadata Search</a>

**Permission Sets (1)**

Name	API Name	User License	Last Modified Date
<a href="#">test_permission_set</a>	test permission set	Salesforce	2/24/2013 8:31 AM

- A Metadata Search Result page will open up on the left side with all different set of components which is supported by this application.
- The component section (on left side) will also indicate the number of any other related components which matches your search text.
- The actual search result will be displayed on the right side of the search page

v. Click any component on left side to do a search within your current view

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions Products Reports

## Metadata Search

**Search Results** permission   [i](#)

Pages (0)

**Apex Classes (1)**

Name	Created Date	Last Modified Date
<a href="#">PermissionSetManagerController</a>	3/21/2013 4:26 AM	3/21/2013 4:26 AM

## 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](mailto:support@satrangtech.com)