



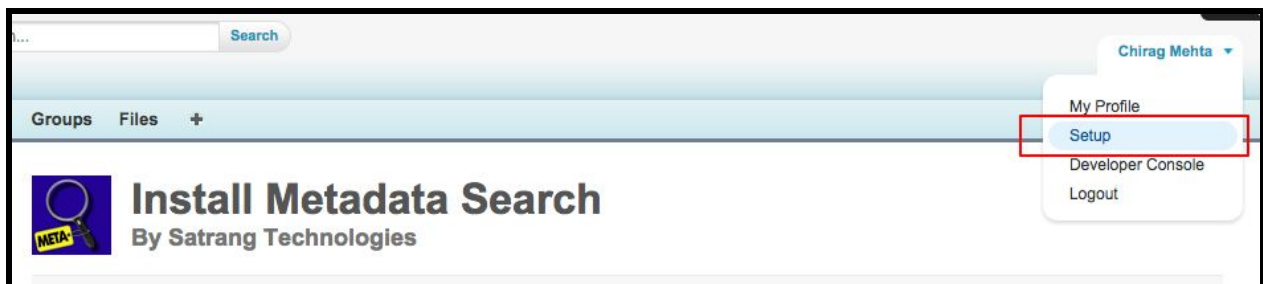
Metadata Search Configuration Guide

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

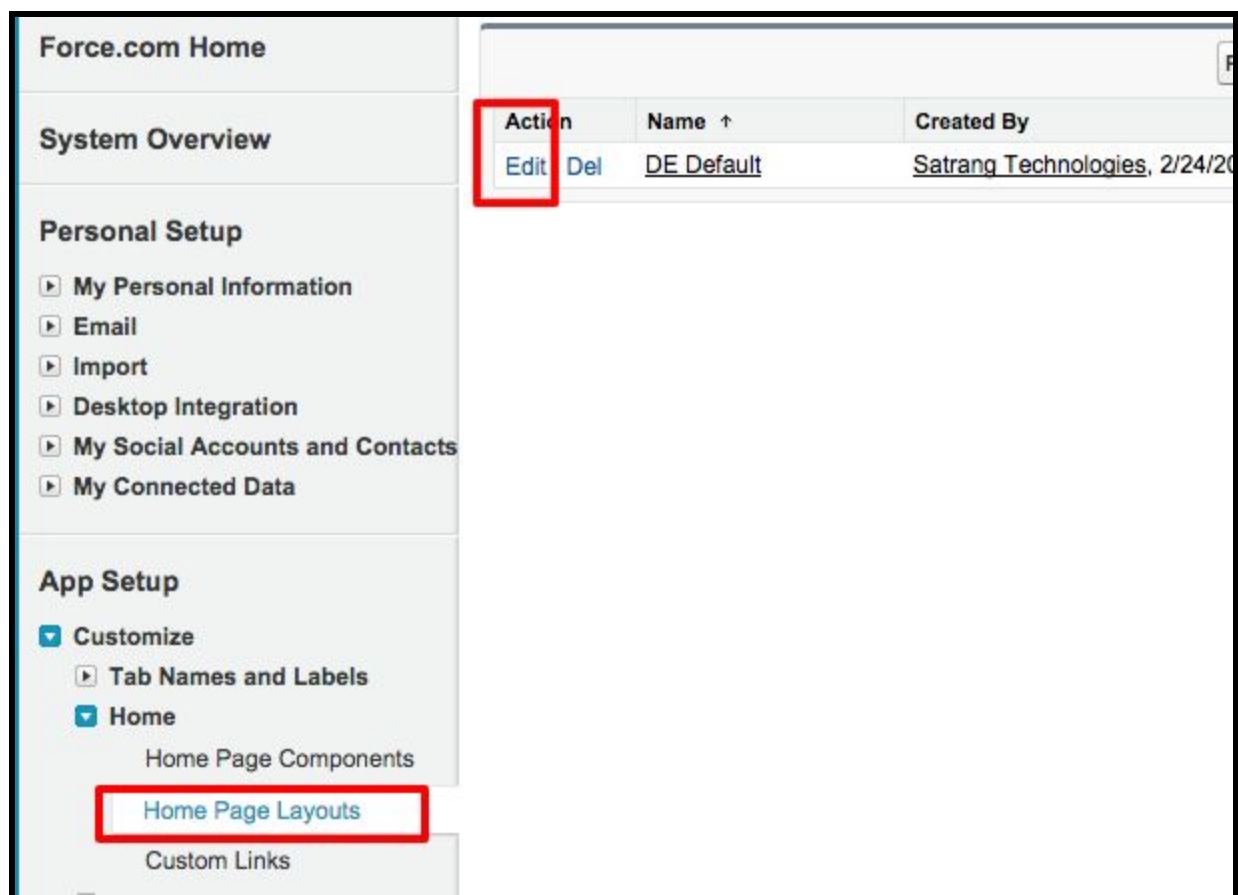
1. Navigation to App Setup.
2. Editing the Homepage Layout.
 - a. Enabling the '**Quick Metadata Search**' Home Page Component.
 - b. Reordering the components.
 - c. Modifying your Organization's user interface settings for the Sidebar component.
3. Testing the dry-run of the Metadata Search application.

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 <input type="checkbox"/>	Calendar <input type="checkbox"/>
Tasks <input type="checkbox"/>	Dashboard Snapshot <input type="checkbox"/>

Select Narrow Components to Show

Sidebar Search <input type="checkbox"/>	Create New... <input checked="" type="checkbox"/>
Document Search <input type="checkbox"/>	Recent Items <input checked="" type="checkbox"/>
Solution Search <input type="checkbox"/>	Messages & Alerts <input type="checkbox"/>
Product Search <input type="checkbox"/>	Custom Links <input type="checkbox"/>
Tags <input type="checkbox"/>	Customer Portal Welcome <input type="checkbox"/>
Quick Metadata Search <input checked="" type="checkbox"/>	Metadata Search <input type="checkbox"/>

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

b. Reordering the components

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

Edit Home Layout

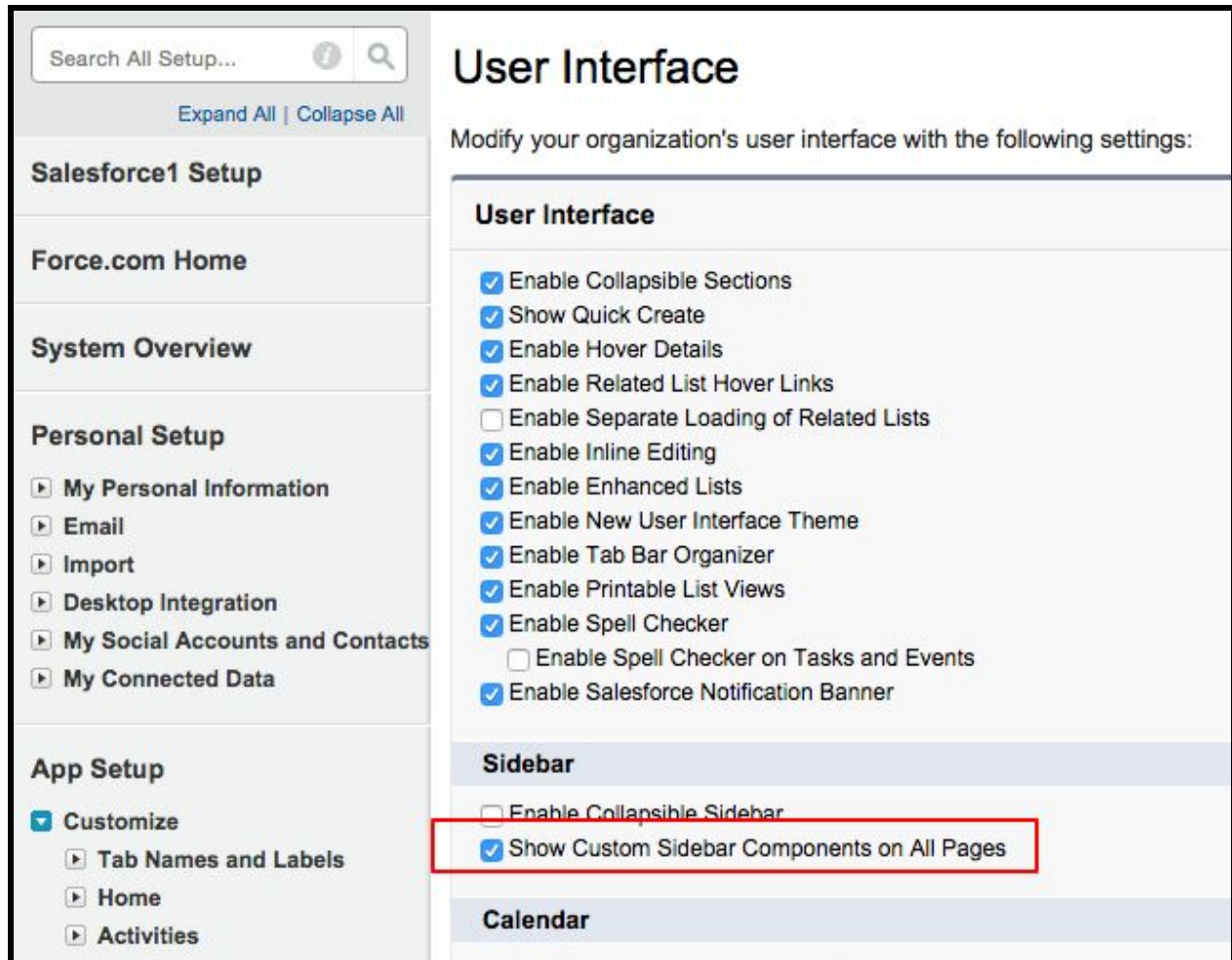
Step 2. Order the components

Arrange the components on your home page.

Narrow (Left) Column		Wide (Right) Column	
Quick Metadata Search	Top	--None--	Top
Create New...	Up		Up
Recent Items			
	Down		Down
	Bottom		Bottom

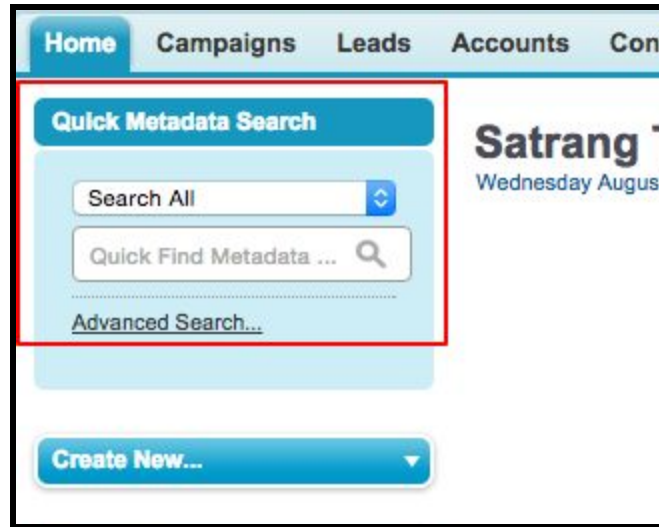
c. **Modifying your Organization's user interface settings for the Sidebar component**

- 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**.

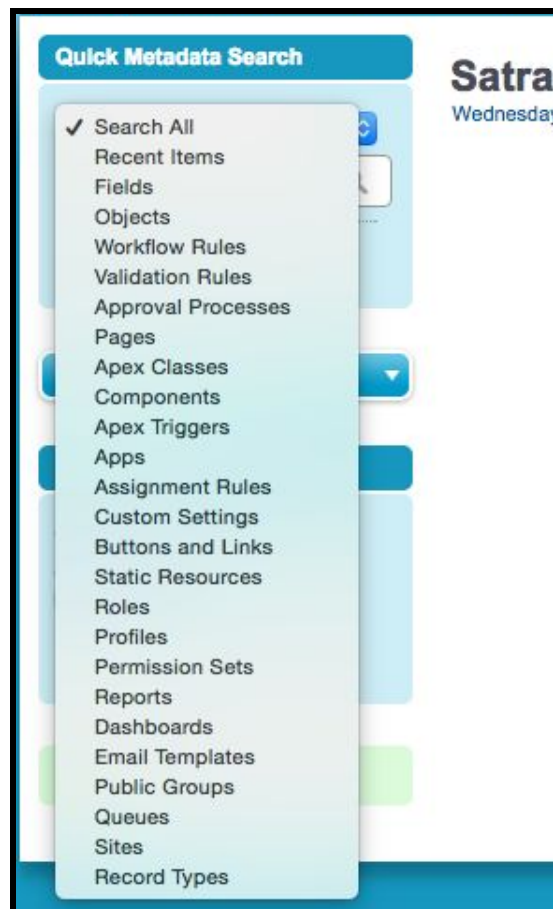


3. **Do a Dry Run to test the Metadata Search Application.**

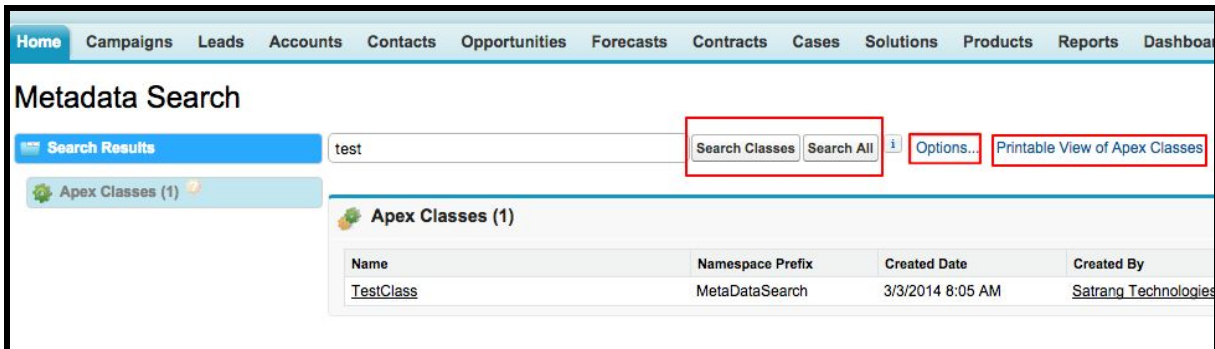
- Click on the **Home tab** or **any tab** with **sidebar**.
- You should be able to see the Quick Metadata Search custom component appear on the left hand side bar.



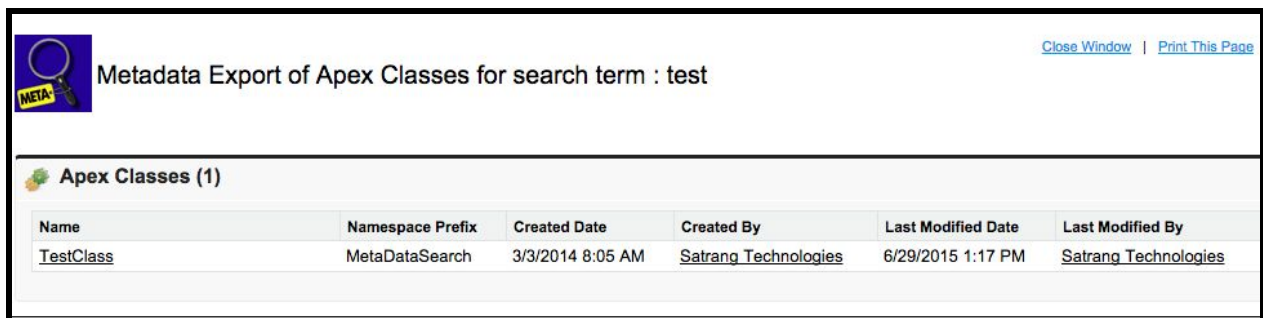
- From the drop down select what you want to search, you can search for example profiles, roles , permission sets etc. Enter the text you want to make a search for and press Enter.



- 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

Search Options

Query Limit For Body Elements ?

Rows To Display ?

Search Results Limit ?

Search Fields ☒

Search Managed Classes ☒

Search Managed Components ☒

Search Managed Fields ☒

Search Managed Objects ☒

Search Managed Pages ☒

Search Managed Triggers ☒

Search Objects ☒

Search Validation Rules ☒

Search Workflow Rules ☒

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.

salesforce

Satrang Technolo...

Help

Sales

Home

Campaigns

Leads

Accounts

Contacts

Opportunities

Forecasts

Contracts

Cases

Solutions

Products

Reports

Dashboards

+

Support

Metadata Search

Search Results

test

Search

Options...

Printable View

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

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 == "aaple"	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	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)

Name	Label	Namespace Prefix	Created Date	Created By	Last Modified Date	Last Modified By
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)

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

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	Satrang Technologies	2/24/2013 8:29 AM	Satrang Technologies

Roles (1)

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

Profiles (1)

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

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

Queues (1)


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

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
Metadata Search Configuration Guide

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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	<div> <div>Immediate Actions:</div> <ul style="list-style-type: none"> test_email_alert (Alert) </div>


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 == "apple"	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	Processes 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	Satirang Technologies	10/20/2014 12:43 AM	Satirang Technologies
test	test		3/22/2013 8:12 AM	Satirang Technologies	3/22/2013 8:15 AM	Satirang Technologies


Apex Classes (1)


Name	Namespace Prefix	Created Date	Created By	Last Modified Date	Last Modified By
TestClass	MetaDataSearch	3/3/2014 8:06 AM	Satirang Technologies	6/29/2015 1:17 PM	Satirang 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
testsource	Private	application/octet-stream	2/24/2013 8:29 AM	Satirang Technologies	2/24/2013 8:29 AM	Satirang Technologies


Roles (1)


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


Profiles (1)


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


Sites (0)

No matches found.


Record Types (0)

No matches found.