

Salesforce.com Metadata Scanner

Installation and Configuration Guide

The following document details the installation and configuration requirements to extract the metadata necessary from within your Salesforce.com tenant(s).

Version History

Version	Date	Notes
1.0	08 March 2021	Initial release.

PreRequisites:

- Syniti Stewardship Tier 7.1.4 or higher
- Syniti Metadata Discovery
- Salesforce user, password, security token, client ID and client secret
 - See Configuring Salesforce API access section below for instructions
- Install package for the salesforce metadata scanner from support.syniti.com

Installation:

Run the script that was included in this installation package on the SQL server environment where Syniti Metadata Discovery is installed.

Salesforce Scanner Install.sql

Configuring Salesforce API access

To use this plugin you will require a salesforce user, password, security token, client ID and client secret. See the following articles for guidance on the configuration

- <https://stackoverflow.com/questions/12794302/salesforce-authentication-failing/29112224#29112224>
- https://developer.salesforce.com/docs/atlas.en-us.196.0.api_rest.meta/api_rest/intro_defining_remote_access_applications.htm

Install Metadata Scanner Technology

Run the script that was included in this installation package on the SQL server environment where Syniti Metadata Discovery is installed.

Name of the file: *Salesforce Scanner Install.sql*

Configuring Salesforce Metadata Extract

1. Navigate to the **Metadata Discovery** webapp
 - a. Configuration → Metadata Scanner Technology → Salesforce (Extract Param page).
2. **Add** Extract Record for your Salesforce tenant (i.e. Salesforce North America)
 - a. Extract ID (i.e. Salesforce NA)
 - b. API Version (i.e. v48.0)
 - c. Username (i.e. email address for salesforce login)
 - d. Vertical View
 - i. Client Secret
 - ii. Password and Token
3. Click **Extract**

Create System Type Model Views

1. Run the install script for the Salesforce.com metadata scanner to create the System Type Model and the supporting views.

Create System Type from Model

1. Create a new System Type (i.e. Salesforce.com)
2. Import the data from the System Type Model that was created in previous steps.

Add Data Base, Instance and Schemas

1. Navigate to Syniti Metadata Discovery application
2. Locate the System Type created in the steps above.
3. Enter Instance and Database information
4. Navigate to the Tables and enter schema information in mass update or individually.

