

Document Metadata

Introduction

Metadata allows the inclusion of additional fields within specific Claromentis applications, such as Documents and News. Fields allow users to submit further information, which is more specific to the object being added or modified. Metadata sets are essentially categories containing metadata fields. By default, most available metadata sets are pre-created.

Creating a New Metadata Field

- Go to Applications > Admin > Documents. Click on "Metadata" from the list on the bottom right hand side of the screen.
- Click on the documents link as shown in image 1.

The screenshot shows the 'Misc metadata' and 'Publish metadata' sections on the left, and the 'Documents metadata' section on the right. The 'Documents metadata' table is highlighted with a red border. An arrow points from the 'Documents' link in this table to the caption below.

Name	Type
Common metadata heap	Common metadata heap
Image Gallery	Image Gallery
Image Gallery	Image Gallery
News	News
Users	Users
Idea Spaces	Discuss
Projects	Project

Name	Type
Publish folders	Publish folders
Publish pages	Publish pages

Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

Name	Type
No metadata sets	

Click on Documents to see the applications current metadata list

Image 1 - From back end of Documents application a new metadata field can be created

- Now you will see the screen in image 2.
 - There are 3 pieces of metadata that have been added to documents so far: review date, author and related documents. (Any default metadata will not appear here as it is hard coded and cannot be changed e.g description, related documents)
- To add new metadata click "Create new field" at the bottom of the page.

Admin / Metadata / Edit metadata set

Metadata for: Documents

Metadata set name: Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
doc_review_date	Review Date	Date		✓		
author	Author	User select		✓		
related_documents	Related Documents	Reference to document		✓	✓	

Use drag-and-drop on first column to change order of fields

Add your new field here

List of existing fields and their type

Image 2 - Table of current metadata fields for documents

- Now enter the required information for your new field in the screen shown in Image 3.
 - (The key will auto fill depending on your entered title.)
- Select the type that best suits your new field from the dropdown menu.
 - For example the review date field shown in the table in Image 2 has a type of "date". This is because the data entered will be the date that the document will be reviewed on, so is best displayed in numerical format rather than text.

Admin / Metadata / Edit metadata set / New metadata field

Title

Key

This Key is the metadata field's internal name used in searching and user import. Key should contain only letters, numbers and "_"

Type

Show as

Default value

Editable by users
 Repeatable
 Can be inherited from parent
 Visible
 Visible even if no value
 Mandatory

- ✓ String
- Long text
- Integer
- Checkbox
- Datetime
- Date
- Date (no year)
- Select (options)
- Multi-select
- Reference to document
- Hyperlink
- User select
- Indicator (text and image)
- File upload
- Image upload
- Address

- Text input (single-line)
- ✓ Small Textarea
- Medium Textarea

Image 3 - The arrows denote the drop down menu for "type" and "show as". "Show as" will change depending on what type has been selected. "String" has the 3 options shown above.

- For this example the new data field will be a string type (text) and it will show as a small text area box that allows text input.
- Default Value means
- The final list of tick boxes can be toggled. In this example the field will be editable by users and they will

be able to see it in the table shown in Image 1, as well as the front end when uploading a new document.

- If mandatory has been selected the field *must* be filled in for every document forthwith, otherwise the system will display a prompt to users to complete the field before continuing. (A red asterisk will also appear next to the field name to show it has to be completed).
- When you have completed entering data for your new field, click the "Add new" button at the bottom of the page.

Admin / Metadata / Edit metadata set

Metadata for: Documents

Metadata set name: Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
doc_review_date	Review Date	Date		✓		
author	Author	User select		✓		
related_documents	Related Documents	Reference to document		✓	✓	
new_data	New data	String		✓		

Use drag-and-drop on first column to change order of fields

Image 4 - New field has now been created and displayed alongside the preexisting ones

- You will return to the table first accessed in Image 3. Your created field will now be shown in the table.
 - If you wish to change its position in the table (and therefore the order when accessing the front end of the documents application) drag and drop your field to the new desired position.
- To see your new field in action head to Application > Documents.
 - Navigate to a folder and click on the green "Add document button" select "Detailed upload" from the next pop up to see the screen in Image 4.
 - The new field will now be shown here for users to fill in.

To modify/create fields at any time just follow the pathway
Applications > Admin > Documents > Metadata > Documents

Documents / Document Library / User Guides / **Add new Document**

Files
 or select from pre-uploaded...

Tags
 popular tags: intranet, claromentis, microsoft, excel, social

Workflow -- None -- Take responsibility

Review Date

Author

Related Documents

New data

Description

Inherit

Version comment

Permissions Inherit rights from parent folder

 All registered
 Owner
 Role: Administrators

View
 Create Draft
 Edit & Approve
 Move/delete
 Edit Metadata
 Edit permissions
[View effective permissions...](#)

Notifications None Select recipients

Status Mark as draft

New field added in image 3 now appears when uploading a new document

Image 5 - From "Detailed Upload" section when uploading a document, the new field is now displayed.

Related Article

[Uploading a Document](#)