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.

Image 1 - From the admin side of the 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 hardcoded and cannot be changed e.g description, related documents)
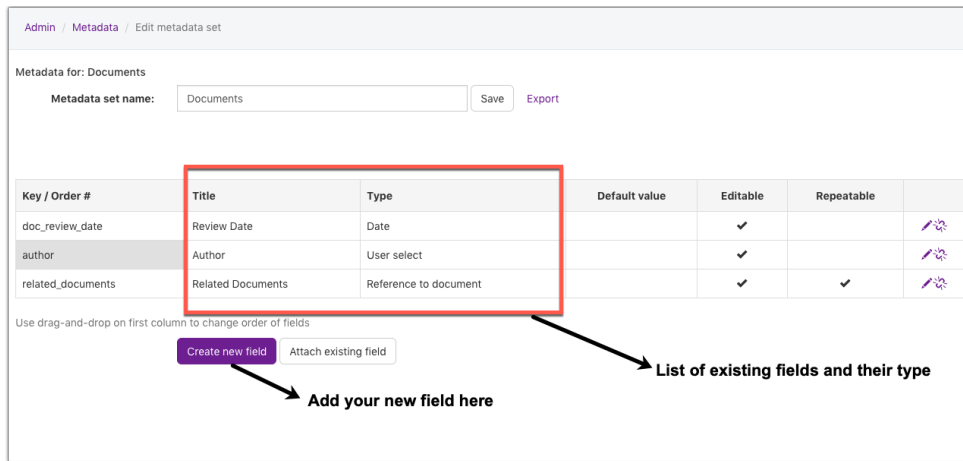- To add new metadata click "Create new field" at the bottom of the page.

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, so is best displayed in numerical format rather than text.
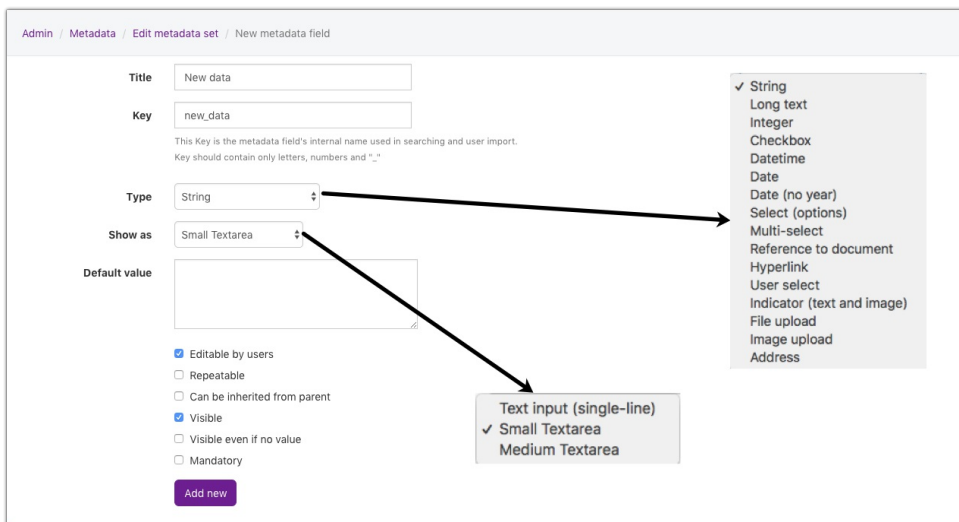

Image 3 - The arrows denote the drop-down menu for "type" and "show as". "Show as" will change depending on what type has been selected. "String" has the 3 options shown above.

- 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.
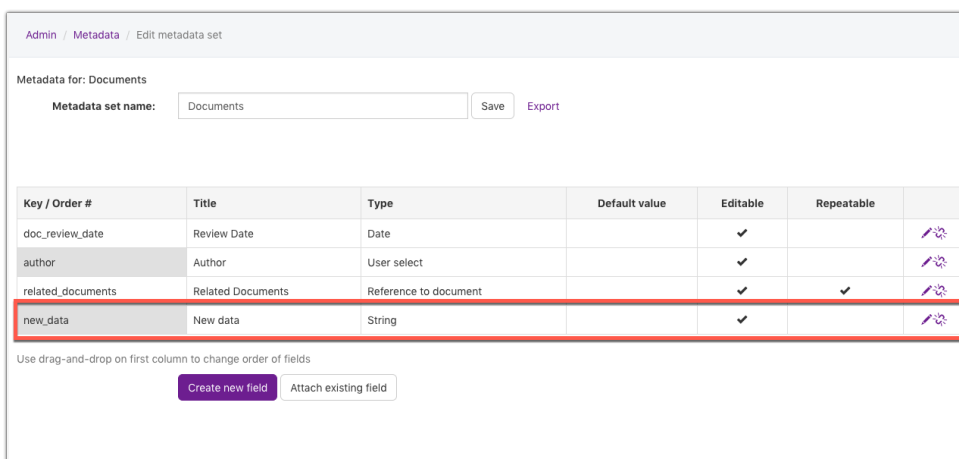

Image 4 - New field has now been created and displayed alongside the prexisting ones

- 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" and 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

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

Related Article

Uploading a Document