

Document Metadata

The Metadata application allows the inclusion of additional fields within other Claromentis applications, such as Documents and News.

These fields allow users to submit further information alongside the original item, which is more specific or further differentiates the object being added or modified.

Metadata sets are essentially categories containing fields. By default, most sets are enabled but others can be configured by an administrator.

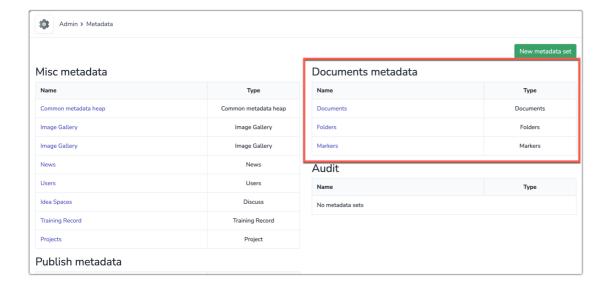
Accessing Documents Metadata

Only an application administrator of the Metadata Application can make changes.

Go to Applications > Admin > Documents. Click on 'Metadata' from the list on the bottom left-hand side of the screen.



The Document metadata sets are listed:



Click on each to show the fields already included in each and edit them or add new ones.

Once modified or created they will appear on the front end in the corresponding areas for users to implement.

Considerations

Brain storm with your team what other fields you would like users to be able to fill out when uploading documents and then create these in the corresponding set.

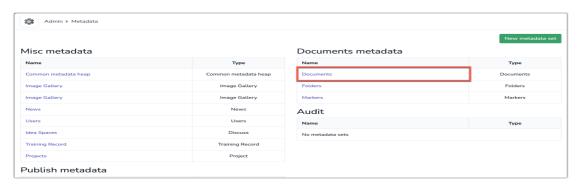
Once saved the fields can be edited, removed or changed order (which affects the order they appear on the front end) by an administrator.

Play around with creating new fields, checking they appear on the front end and making tweaks over time.

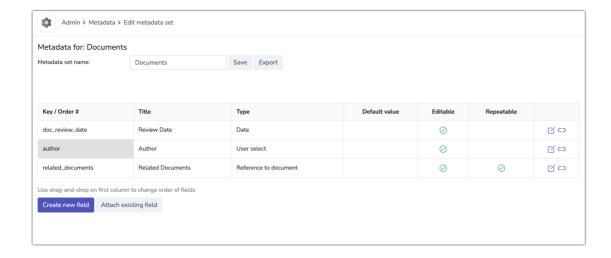
End users may even provide feedback on fields they would like to be able to use.

Example - Creating a new Document Metadata field

Click on the 'Documents' metadata set:



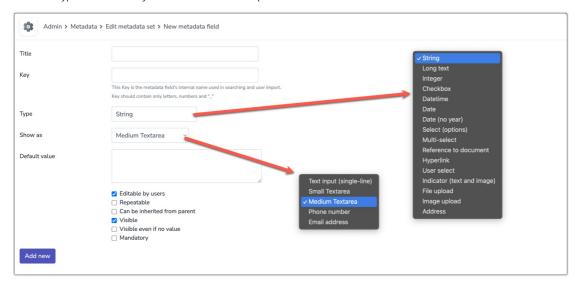
By default, metadata fields will appear, as they are installed with Claromentis: review date, author and related documents. (Any hardcoded metadata will not appear here as it cannot be changed, e.g description, related documents)



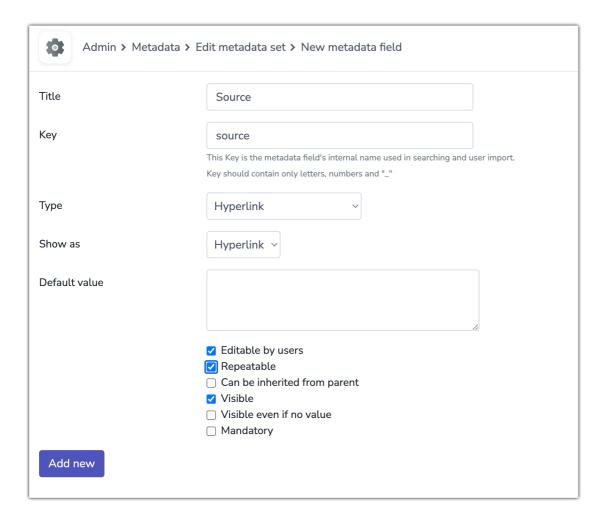
To add new metadata click 'Create new field' at the bottom of the page.

Now enter the required information for your new field. (The key will auto-fill depending on your entered title)

Select the type that best suits your new field from the dropdown menu:



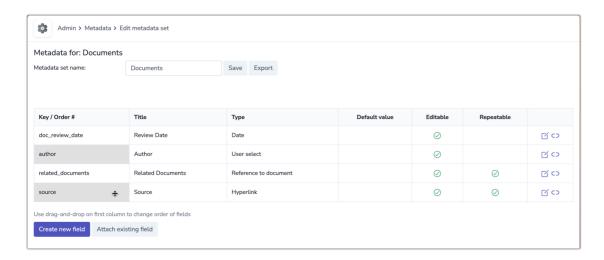
In this example a 'Source' field has been created with type 'hyperlink'. This is going to facilitate users attributing a source website to files they upload (where applicable):



The field has been made repeatable so users can add more than one against a document on the front end if needed.

If mandatory had 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).

Once ready click 'Add new' button at the bottom of the page to save and create the field.

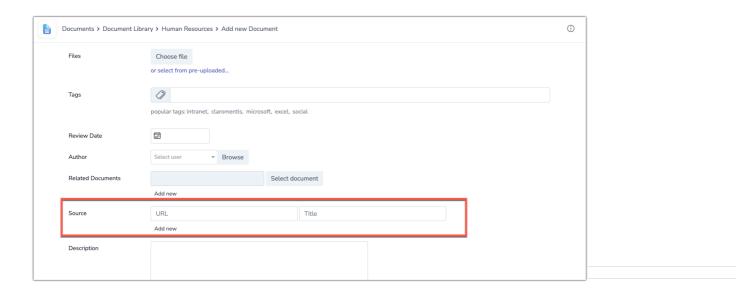


You will return to the Documents metadata table and see the new field is now listed.

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 and add a new document to a folder you have permission for

The new field will appear on the detailed upload page and can be filled in:



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Tags: intranet, user guide, document, metadata