



## 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.

ERMS features	
<input type="checkbox"/> Use ERMS records [ERMS_CONFIG.RECORD]	
<input type="checkbox"/> Use ERMS markers [ERMS_CONFIG.MARKERS]	
<input type="checkbox"/> Use record types [ERMS_CONFIG.RECORD_TYPES]	
<input type="checkbox"/> Use multi-component documents [ERMS_CONFIG.MULTICOMPONENT_DOCUMENT]	
<input type="checkbox"/> Use 'security levels' in permission system [ERMS_CONFIG.SECURITY_LEVEL]	
<input type="checkbox"/> Use MDS signature for documents [ERMS_CONFIG.MDS_SIGNATURE]	
<input type="checkbox"/> Use export/import for ERMS objects [ERMS_CONFIG.EXPORT_IMPORT]	
<input type="checkbox"/> Use ERMS schedules [ERMS_CONFIG.SCHEDULE]	
<input type="checkbox"/> Use Google drive links [ERMS_CONFIG.GDOC_LINKS]	
<input type="checkbox"/> Use Microsoft OneDrive links [ERMS_CONFIG.ONEDRIVE_LINKS]	

Statistics	
Number of Documents	89
Number of all versions of documents	95
Number of checked out documents	0
Total space occupied by documents	403.12 Mb

The Document metadata sets are listed:

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

Documents metadata	
Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

Audit	
Name	Type
No metadata sets	

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:

Admin > Metadata

New metadata set

Misc metadata

Name	Type
Common metadata heap	Common metadata heap
Image Gallery	Image Gallery
Image Gallery	Image Gallery
News	News
Users	Users
Idea Spaces	Discurs
Training Record	Training Record
Projects	Project

Publish metadata

Documents metadata

Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

Audit

Name	Type
No metadata sets	

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

Admin > Metadata > Edit metadata set

Metadata set name: Documents 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

Create new field Attach existing field

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:

Admin > Metadata > Edit metadata set > New metadata field

Title

Key

Type

Show as

Default value

Editable by users

Repeatable

Can be inherited from parent

Visible

Visible even if no value

Mandatory

Add new

String

Long text

Integer

Dropdown

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

Phone number

Email address

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):



Admin > Metadata > Edit metadata set > New metadata field

Title

Source

Key

source

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

Type

Hyperlink

Show as

Hyperlink

Default value

☒ Editable by users

☒ Repeatable

☐ Can be inherited from parent

☒ Visible

☐ Visible even if no value


☐ Mandatory

Add new

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.

















Admin > Metadata > Edit metadata set

Metadata for: Documents

Metadata set name: Documents 

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				 
source	Source	Hyperlink				 

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

Create new field


Attach existing 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:



Documents > Document Library > Human Resources > Add new Document

Files

Choose file

or select from pre-uploaded...

Tags

popular tags: intranet, claremonts, microsoft, excel, social

Review Date

Author

Select user

Browse

Related Documents

Add new

Select document

Source

URL

Title

Add new

Description

