

## Metadata overview

### Introduction

Access the Metadata application by heading to **Applications > Admin > Metadata**.

Metadata can be used to provide additional information and/or supporting information about content that exists on your intranet. You can manage and create new metadata according to the needs of the intranet as an application administrator.

Metadata for the following applications will be covered in this guide:

- [Gallery application](#)
- [News application](#)
- [People application](#)
- [Discuss application](#)
- [Learning application](#)
- [Projects application](#)

For more information on Documents metadata, head to our article [here](#).

### Managing metadata sets

Under **Misc metadata**, you can select any of the available applications to view, edit, and manage existing metadata.

A screenshot of the Metadata application interface. The breadcrumb path is 'Admin / Metadata'. There is a 'New metadata set' button in the top right. The interface is divided into two main sections: 'Misc metadata' and 'Documents metadata'. The 'Misc metadata' table is highlighted with a red border. The 'Documents metadata' table is also visible. Below these is an 'Audit' section with a table showing 'No metadata sets'.

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

Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

**Audit**

Name	Type
No metadata sets	

A new metadata set can also be added by selecting [New metadata set](#)

Admin / Metadata

[New metadata set](#)

### Misc metadata

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

### Documents metadata

Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

### Audit

Name	Type
No metadata sets	

By doing so, 'Metadata set type' for other applications including the Knowledge Base & Courses application can be created and named as desired.

Admin / Metadata / New metadata set

Metadata for: New set

Metadata set type:

Metadata set name:

## Creating metadata

When accessing a metadata set, the metadata field(s) will be displayed for each application.

New metadata for each application can be created by using

Admin / Metadata / Edit metadata set

Metadata for: Common metadata heap

Metadata set name:

Key / Order #	Title	Type	Default value	Editable	Repeatable
No metadata fields					

The following information can be configured.

Admin / Metadata / Edit metadata set / New metadata field

1 Title

2 Key

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

3 Type

4 Show as

5 Default value

6

Editable by users

Repeatable

Can be inherited from parent

Visible

Visible even if no value

Mandatory

1. **Title:** The title of the metadata field
2. **Key:** The internal name of the metadata field used in searching and user import. The Key should contain only letters, numbers and underscores
3. **Type:** The field type used for the metadata field
4. **Show as:** The appearance of the field e.g. a text box
5. **Default value:** Information that can autofill the field without interaction from the user
6. **Optional settings:** Additional settings that can be configured if appropriate for the metadata

### Optional settings

- **Editable by users:** Users will be able to view & edit the information entered in the metadata field.
- **Repeatable:** The option to add an extra field of the same configuration will be available. Up to 5 maximum can be added for most field types.
- **Can be inherited from a parent:** The option for sub-metadata items to inherit parent metadata items. This option is mostly intended for the Document application.
- **Visible:** The metadata field will appear in the areas chosen if the field has information entered.
- **Visible even if no value:** The metadata field will appear in the areas chosen even if the field has no information entered.
- **Mandatory:** The metadata field will be required to have information entered and will be marked by a red asterisk.



Metadata can be edited by selecting the 'pencil' icon or deleted by selecting the 'detach' icon.

The order of the metadata can also be changed by using the drag & drop feature, if applicable.

Admin / Metadata / Edit metadata set

Metadata for: News

Metadata set name:

Key / Order #	Title	Type	Default value	Editable	Repeatable	
news_source	Source	Hyperlink		✓		 

**Please note:** Any default metadata will not appear here as it is hardcoded and cannot be changed.

## Misc metadata

Each application has different metadata to select from.

## Image Gallery metadata

Image Gallery metadata is metadata attached to the images & albums in the **Gallery application**.

Admin / Metadata / Edit metadata set

Metadata for: Image Gallery

Metadata set name:  Save Delete this set Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
image_description	Image Description	String		✓		

Create new field Attach existing field

Metadata can be found by heading to the Gallery album properties. You can select 'Metadata Options' to add the metadata field you wish to display in the album images.

Image Gallery / Edit album ★ My favourites ✕

Title:

Description:

Metadata Options

Metadata set:

Fields: Note: a maximum of three options can be selected as metadata

Hide	Show
ID	Image title
Date	Added by
Keywords	
[m]Image Description	

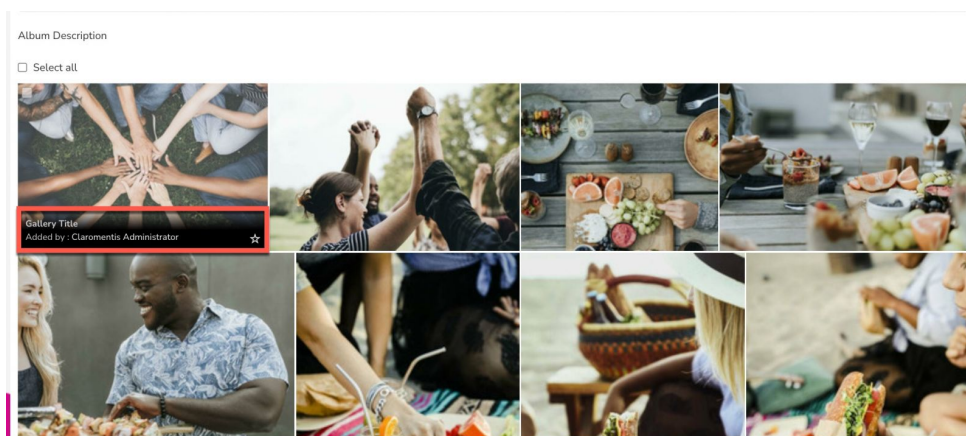
Make images from this album available in rich content.

Set permissions:  Browse Remove

- All registered
- Role: Administrators

**Please note:** A maximum of three metadata fields can be selected to display per album.

Metadata for each image will be displayed when hovering over the image upon saving any changes.



## News metadata

News metadata is metadata attached to news articles in the **News application**.

Admin / Metadata / Edit metadata set

Metadata for: News

Metadata set name:  Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
news_source	Source	Hyperlink		✓		

Create new field Attach existing field

Metadata can be found by heading to the article properties in the 'Metadata' tab.

News / Add News Article + Add news

Article details **Metadata** Additional options All

Source

Submit news Save as draft

Metadata for each news article will be displayed below the article text upon saving any changes.

News / Marketing / Article details

### News

Marketing | 16 November 2021 by Alan Metcalfe



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Source: [Source ABC](#)

## Users metadata

Users metadata is metadata attached to user profiles in the **People application**.

Admin / Metadata / Edit metadata set

Metadata for: Users

Metadata set name:  Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable
usr_city	City	String		✓	
usr_address	Address	Address		✓	
usr_phone	Landline	String		✓	
usr_mobile	Mobile	String		✓	
usr_pref_contact	Preferred contact method	Select (options)		✓	
usr_career	Career Details	Long text		✓	
usr_interests	Interests	Long text		✓	
address_text	Address	String		✓	
rss_feed	RSS	String		✓	

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

Create new field Attach existing field

Metadata can also be found by heading to the Admin > People > Configure user profile fields.

Admin / People Control Panel

Users Power users Roles Groups Password policy

Utilities

- Add a new user
- Export users
- Add/update from CSV file

Configuration

- General configuration
- Configure user profile fields**
- Configure Skills

Photo	Full name	Role	Group	Extranet area	Email
	Abigail Clark	none	Company, Human Resources, Leadership Team, Learning and Development	Primary Area	abigail@claromentis.net
	Alan Metcalfe	none	Company, Sales	Primary Area	alan@claromentis.net
	Alison Kelly	none	Company, Human Resources	Primary Area	alison@claromentis.net
	Amelia Jackson	none	Company, Human Resources	Primary Area	amelia@claromentis.net
	Anne Wilkins	Administrators, Managers	Company, Leadership Team, Professional Services	Primary Area	veronica.kim@claromentis.com
	Austin Glover	none	Company, Marketing	Primary Area	austin@claromentis.net

This area will show you a list of all available User metadata fields and newly created fields.

Admin / People Control Panel / Configure user profile fields

All user profile fields

Title	Key	Type	Special view permissions	Special edit permissions	Action
ID	id	int	No	No	
Account state	intranetuser	varchar	No	No	
Username	username	varchar	No	No	
Password hash	password	varchar	No	No	
First name	firstname	varchar	No	No	
Surname	surname	varchar	No	No	
User code	user_code	varchar	No	No	
Company	company	varchar	No	No	
Job Title	job_title	varchar	No	No	
Email	emailad	varchar	No	Yes	
Notification method	notification_method	int	No	No	
Extranet area	ex_area_id	int	No	No	
Visual Interface	skin	varchar	No	No	

Add new field

Change field list and order for

- Main users list
- "View profile" page
- "Edit My profile" page
- Advanced search form
- Users list for people admin
- "Edit profile" page in admin area

Permissions

- Permissions for viewing fields
- Permissions for editing fields

**Reminder:** Any default metadata will not appear in the Metadata application as it is hardcoded and cannot be changed. Instead, default metadata can be found via the People application.

For more information on the Configure user profile fields area, head to our guide [here](#).

## Idea Spaces metadata

Idea Spaces metadata is metadata attached to discussion topics in the **Discuss** application.

Admin / Metadata / Edit metadata set

Metadata for: Discuss

Metadata set name:

Key / Order #	Title	Type	Default value	Editable	Repeatable	
topic_summary	Topic Summary	Long text		✓		

Metadata can be found by heading to the Discuss topic properties.

Discuss / Create Discussion

Topic \*

Description \* [SOURCE]

Image

Categories

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

**Topic Summary**

Metadata for each Discuss topic will be displayed in the 'More Details' area upon saving any changes.

Discuss / Claromentis Test

**Claromentis Test**

**More details**

**Created by** Claromentis Administrator on 6 October 2021

**Last Modified by** Claromentis Administrator on 3 May 2022

**Topic Summary** Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Sit amet risus nullam eget felis eget nunc. Maecenas sed enim ut sem.

**Comments**

**Upcoming Events** No upcoming events

## Training Record metadata

Training Record metadata is metadata attached to user training records in the Learning application.

Admin / Metadata / Edit metadata set

Metadata for: Training Record

Metadata set name:  Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
learning__checkbox__type	Learning (checkbox) type	Checkbox	CHECKED	✓		

Create new field Attach existing field

Metadata can be found by heading to Learning > Training Record.

Learning / Training Records / Add/Edit Record Details

Training Name \*

Training Provider

Date Completed \*

Has a Certificate?

Qualification Code

Other Information [SOURCE]

**Learning (checkbox) type**

Send notification to the user that their record has been updated

Save Cancel

Training metadata can also be found by heading to Learning > Events. Marking an event as a Training Event will allow you to use the available metadata.

Training Event  This event will be marked as Training Event and recorded in user's training record

Qualification Code

Qualification Code is a unique alphanumeric code to indicate standard of qualification across wide range of available trainings events or e-Learning. This feature is used in conjunction with Learning Paths.

Learning (checkbox) type

Metadata for each training record will be displayed upon saving any changes.



Learning / Training Records / View Training Record

Home Y Award Chart X

Training Record ABC + Add Certificate

Qualification Code CLAROM02

Training Provider Claromentis

Date Completed 1 March 2022

**Learning (checkbox) type** Yes

Edit

## Projects metadata

Projects metadata is metadata attached to projects in the **Projects application**.

Admin / Metadata / Edit metadata set

Metadata for: Project

Metadata set name:  Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
value	Value	Integer	0	✓		
completion	Completion Date	Date		✓		
services	Services	Multi-select		✓		

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

Create new field Attach existing field

Metadata can be found by heading to the Project properties in the 'Details' tab.

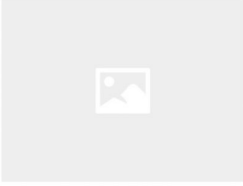
Projects / Add Project

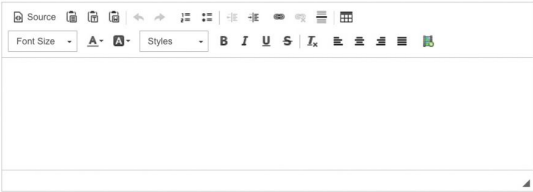
Details Roles & Rights

Company/Client

Project Name

Project Code   
Last project code added: "CLA-02"

Cover Image    
 Delete image

Description 

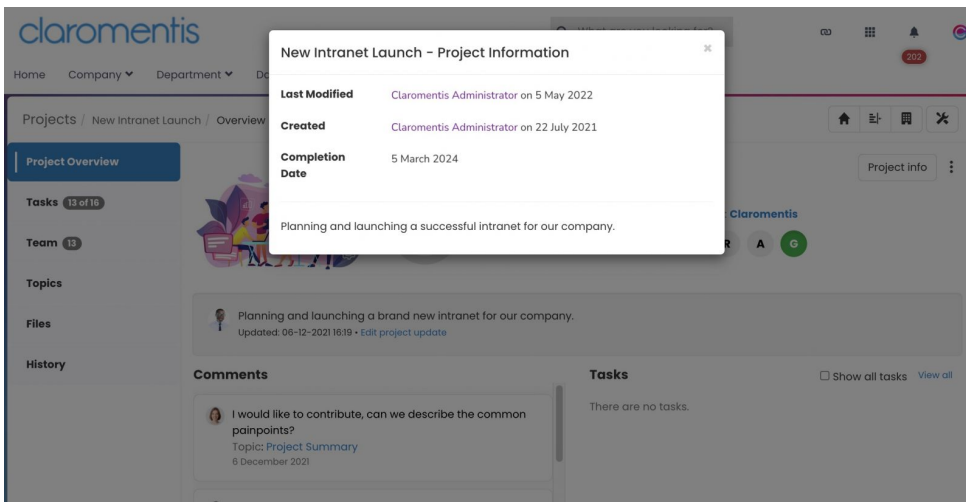
Value

Completion Date

Services   
Lighting  
Shading  
After Care  
Residential Design

Status

Metadata for each project will be displayed in the 'Project Information' section upon saving any changes.



The screenshot shows a project overview page for 'New Intranet Launch'. A modal window titled 'New Intranet Launch - Project Information' is open, displaying the following metadata:

- Last Modified:** Claromentis Administrator on 5 May 2022
- Created:** Claromentis Administrator on 22 July 2021
- Completion Date:** 5 March 2024

The modal also contains a description: 'Planning and launching a successful intranet for our company.'

## Related Article

[Document metadata](#)

Last modified on 1 December 2023 by [Hannah Door](#)

Created on 2 May 2022 by [Veronica Kim](#)

Tags: [intranet](#), [user guide](#), [metadata](#)