



ELO packages

Metadata



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Aspects

Aspects

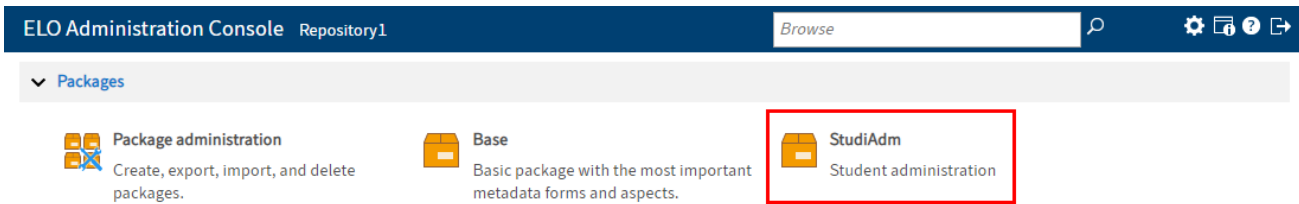
The heart of the metadata (gen. 2) is formed by the aspects.

Aspects consist of fields and views. You can find default fields, e.g. *Filing date*, in the views area of the form designer. For aspects to be shown in the client, you have to define at least one view per aspect.

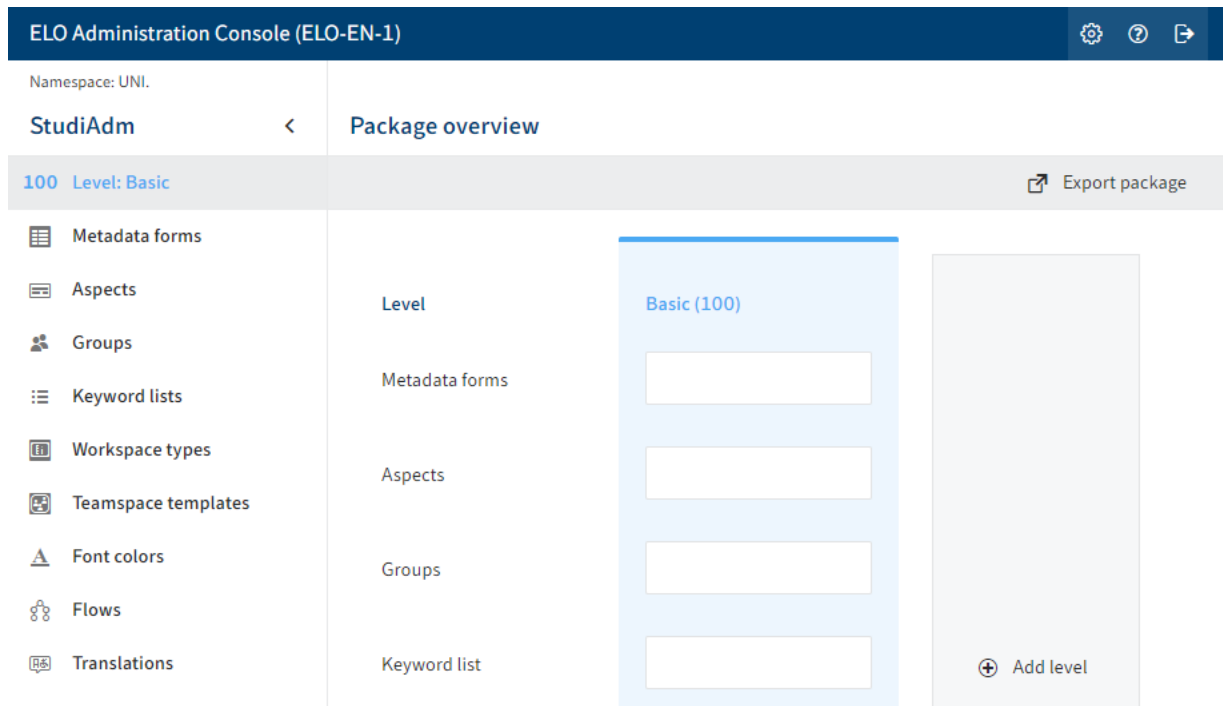
Information

Before creating metadata forms, it makes sense to create a plan of which aspects are needed and which aspects may be able to be used in multiple metadata forms.

Create aspect

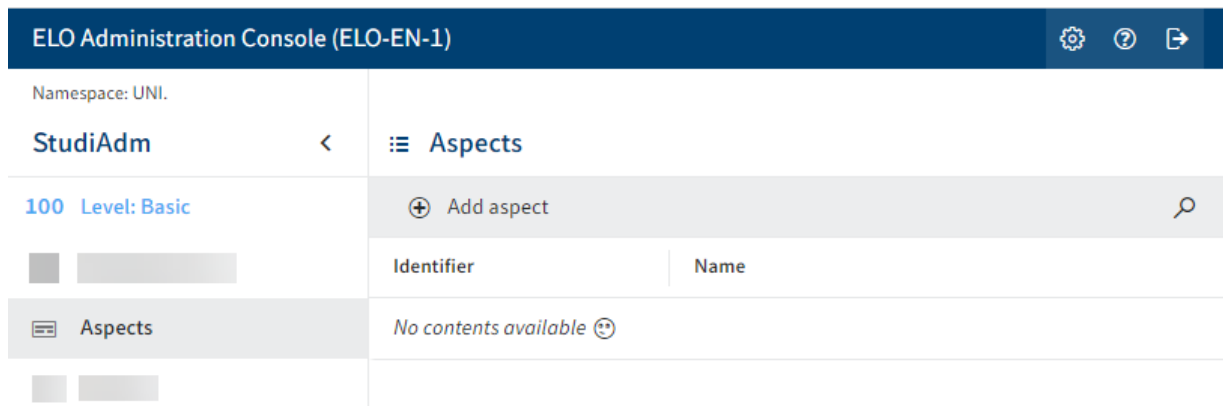


1. In the menu area of the ELO Administration Console, click the package you want to edit.



The package opens.

2. Click *Aspects*.



The *Aspects* tab opens.

- 3.

Click *Add aspect*.

ELO Administration Console (ELO-EN-1)

Aspect

COURSE

100 Add aspect

Identifier	Name
COURSE	Seminar

Overview

Identifier * COURSE

Translation variable UNI.ASPECT.COURSE

Name Seminar

GUID (5EC78424-DC77-0912-DD10-E3A3469B2253)

Last changed on 19.01.2023 16:55

Fields

Add field

Identifier	Name	Field type
No contents available		

The aspect has been changed.

Save aspect Cancel

The *Aspect* dialog box appears.

- Enter a technical name in the *Identifier* field.

Information

Only uppercase letters are possible.

- Enter a translation variable into the *Translation variable* field.

Information

Option 1: Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.

Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

- Click *Save aspect*.

The aspect is created.

Add fields

After an aspect is created, you can add one or more fields to the aspect.




1. Click the aspect you want to edit.




The settings for the selected aspect open.


▼ Fields










⊕ Add field 🔍		
Identifier	Name	Field type
No contents available 😊		

2. Click *Add field*.

ELO Administration Console (ELO-EN-1)   

   COURSE_NAME


100  Delete field


Identifier *

COURSE_NAME


Translation variable

UNI.ASPECTLINE.COURSE_NAME 

Name

Seminar title 

Field type

Text in general 


Data type

Text


Default value

☐ Exclude from iSearch



Translation variable



Comment



Dynamic keyword list

The aspect has been changed.
 Save aspect  Cancel

The settings for the field you are adding open.

3. Enter a technical name in the *Identifier* field.

Information

Only uppercase letters are possible.

4. Enter a translation variable into the *Translation variable* field.

Information

Option 1: Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.

Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

5. Select a field type via the *Field type* drop-down menu.

Choose from the following options:

- Text in general: In *Text* type fields, you can enter any characters.
- Integer: In *Integer* type fields, you can enter any whole numbers.
- Floating-point number: In *Number* type fields, you can enter floating-point numbers.
- Date: In *Date* type fields, you can enter a date via a calendar function. The format is based on the settings in the client.
- Date with time: In *DateTime* type fields, you can enter a date and time via the calendar/clock function. The format is based on the settings in the client.
- Selection list: *Choice* type fields are shown as selection lists. A keyword list has to be configured.
- Relation: *Relation* type fields are shown in relation to a metadata form. A metadata form has to be configured as a *relation target*.
- User: *User* type fields are shown with a selection of users.
- E-mail address: In *E-mail* type fields, you can enter an e-mail address. From this field, the user can open a linked window in an e-mail program.
- URL: In *URL* type fields, you can enter a URL. From this field, the user can open a browser window with the website.
- Check box: *Check box* type fields generate a check box.

Option 1: If necessary, enter a value in the *Default value* field. This value is automatically entered when the metadata form is shown. The user can change the value as required.

Option 2: To not add the content of the field to the ELO iSearch search index, enable the option *Exclude from iSearch*.

Option 3: If necessary, enter additional information in the *Comment* field.

Option 4: If necessary, enter a translation variable for the comment in the *Translation variable* field.

Option 5: Add a dynamic keyword list.

6. Click *Save aspect*.

The field is saved and added to the aspect.

Create view for aspect

For the aspect to be shown in the client, you have to define at least one view.

You can also create multiple views for one aspect. This makes it easier to use an aspect in multiple metadata forms, including variants when displaying them.

1. Click the aspect you want to edit.

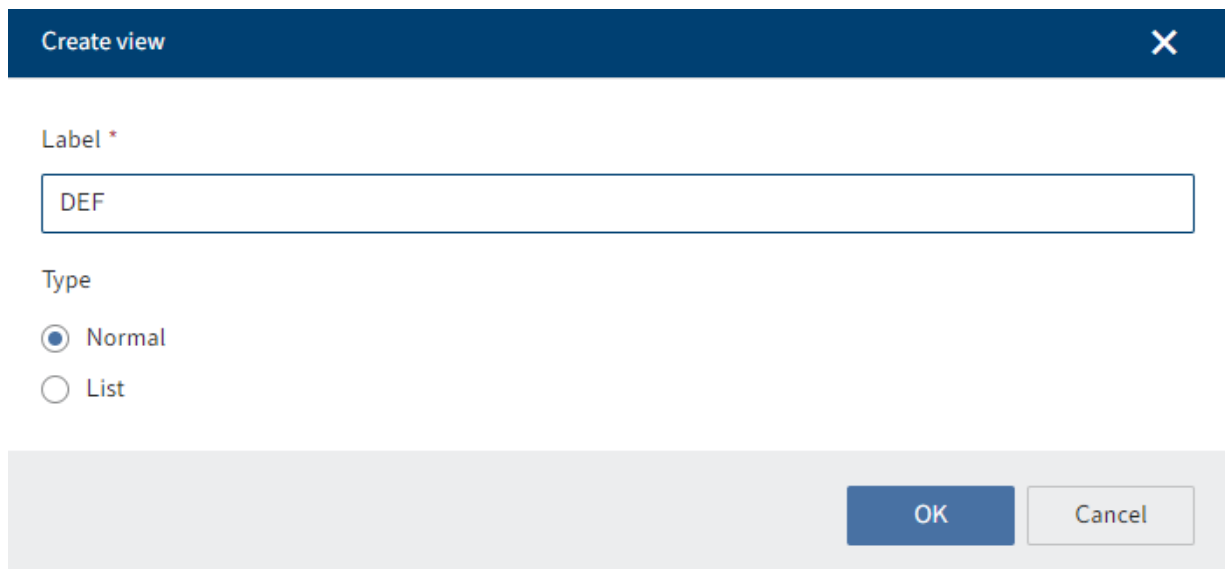
The *Views* dialog box opens.

Views



The image shows a dialog box titled 'Views'. At the top, there is a button labeled '+ Create view' which is highlighted with a red rectangular box. To the right of this button is a search icon. Below the button is a text input field labeled 'Identifier'. At the bottom of the dialog, there is a message that says 'No contents available' followed by a sad face emoji.

2. Click *Create view*.



The image shows a 'Create view' dialog box. It has a dark blue header bar with the title 'Create view' and a close button (X). Below the header, there is a 'Label *' field with the text 'DEF' entered. Underneath the label field is a 'Type' section with two radio buttons: 'Normal' (which is selected) and 'List'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'.

The form designer (gen. 2) opens. The *Create view* dialog box is open.

3. Enter a name in the *Name* field.
4. Select a view type via the radio buttons.

Choose from the following options:

- Normal: Default view
- List: View as list/table.

Please note

The view for the aspect must be created with the *List* type if you want to enable the option *May be created multiple times* for aspect mapping.

5. Click OK.

The screenshot shows the ELO form designer interface. On the left, there is a sidebar with a 'Fields' tab selected. Under 'Fields', there is a list of available fields: Free field, WF field, IX field, Document date, Short name, Extra text, Filling date, Owner, and Version. The main workspace is titled 'DEF' and shows a form layout. At the top, there is a header bar with 'View DEF' and buttons for 'Designer', 'Preview', and 'Save'. The form layout includes a text input field labeled 'Seminar title' and a green horizontal line with an 'Add layout' button below it.

This closes the dialog box. You are now in the form designer (gen. 2).

You will find more information about the items and functions of the form designer under Forms (gen. 2)

Group: Seminar

← DEF

Fields Items

:: Seminar title

:: Free field

:: WF field

:: IX field

:: Document date

:: Short name

:: Extra text

:: Filing date

:: Owner

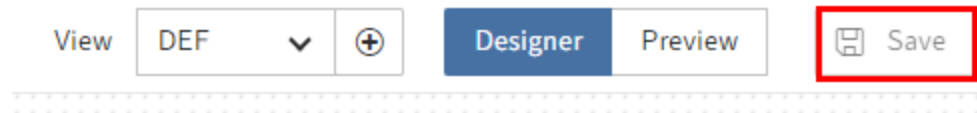
:: Version

On the *Fields* tab, you will see the fields of the aspect as well as default fields.

6. Drag a field to the layout area using drag-and-drop.
7. Repeat the process until you have placed all the desired fields.

Optional: Edit additional field settings under *Properties*.

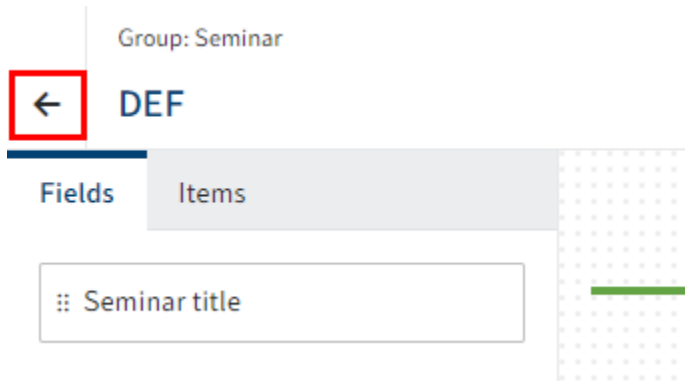
Depending on the data type, you will have different setting options here and can set a minimum number of characters or configure field content validation via regular expressions, for example.



8. Click *Save*.

The view is saved and is now available.

Close the form designer



1. To close the form designer, click the arrow icon.

Once you have defined the necessary aspects and views, you can create metadata forms.

Delete item

Items such as aspects, aspect mappings, and fields are deleted in a similar way. This method is explained below based on an aspect.

Please note

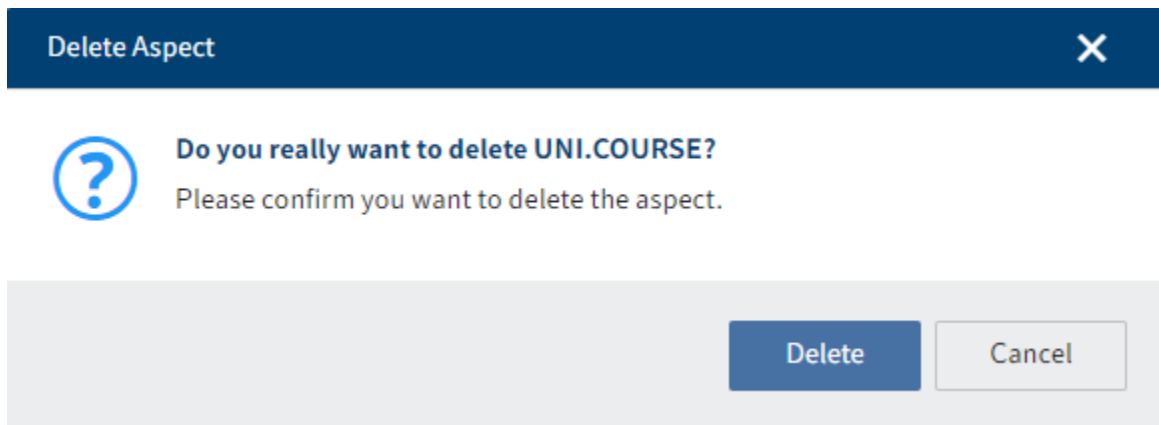
An item can only be deleted if no metadata forms are using this item.

1. Open the package containing the item.
2. Click the item you want to delete.



The corresponding dialog box opens.

3. Click *Delete <item>* (recycle bin icon).



A prompt dialog box opens.

4. Confirm with *Delete*.

The item is deleted.

Metadata forms

Metadata forms

Metadata forms allow you to classify ELO documents by different types. Metadata forms are the framework that hold the aspects and fields together.

What follows is an explanation of the steps for adding new metadata forms and for configuring their content, usage and default values.

To be able to use the aspects you previously created, you have to:

- Create metadata forms
- Assign aspects
- Create views

Please note

When configuring metadata forms, the number of forms used should not reach double-digits.

A separate search index is built for each metadata form. A large number of metadata forms therefore requires a large amount of RAM and hard disk space for the ELO iSearch.

This applies for first generation and second generation metadata forms.

Create metadata form


1. In the menu area of the ELO Administration Console, click the package you want to edit.

The *Metadata forms* tab is selected automatically.




2. Click *Add metadata form*.

Form


 **NEW_METADATA_FORM**


Content Usage Default values

 Delete metadata form

▼ **Overview**



Identifier *

Translation variable 

Name 

Inherit from

▼ **Aspect mappings**

 Add aspect mapping 

Identifier	Name	Occurrence
No contents available 😊		

▼ **Views**

There are unsaved changes.

The *Form* dialog box opens.

Configure content

The screenshot shows a web interface for configuring a metadata form. At the top, there is a dark blue header bar with icons for settings, help, and sharing. Below the header, the form is titled 'Form' and 'COURSE'. There are three tabs: 'Content' (highlighted with a red box), 'Usage', and 'Default values'. A 'Delete metadata form' button is located at the top right of the form area. The 'Overview' section is expanded, showing the following fields:

- Identifier ***: A text field containing 'COURSE'.
- Translation variable**: A text field containing 'UNI.DOCMASK.COURSE' with a dropdown menu icon.
- Name**: A text field with a save icon.
- Inherit from**: A dropdown menu showing 'FACULTY' with an 'Edit inheritance' button.
- GUID**: A text field containing '(AF4E668D-FD46-D938-DA38-5AAFE7F784FD)'.
- Last changed on**: A text field containing '22.12.2022 10:54'.

If you create a new metadata form, a *Content* tab opens by default. Here, you can specify the contents of metadata form properties, e.g. the technical names of forms, aspect mappings, views, or dashboards.

Create overview

1. Enter a technical name in the *Identifier* field.

Information

Only uppercase letters are possible.

2. Enter a translation variable into the *Translation variable* field.

Information

Option 1: Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.

Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

3. Optional: Click *Edit inheritance* to apply aspects and fields from one or more other metadata forms as needed. You can then add to the aspects and create new views.
4. Click *Apply*.

Result

The metadata form is created.

Configure metadata forms

Metadata forms have to be configured before you can use them.

Assign aspects

Form

COURSE

Content

Usage

Default values

Delete metadata form

▼

Overview

Identifier *

COURSE

Translation variable

UNI.DOCMASK.COURSE

Name

Inherit from

FACULTY

Edit inheritance

GUID

(AF4E668D-FD46-D938-DA38-5AAFE7F784FD)

Last changed on

22.12.2022 10:54

▼

Aspect mappings

⊕ Add aspect mapping

Identifier	Name	Occurrence
No contents available 😊		

To fill the metadata form with aspects and forms, you have to assign aspects to the metadata form.

Method

1. Click *Add aspect mapping*.

Aspect mapping

NEW_ASPECTASSOC ✕

Delete aspect mapping

▼ **Overview**

Aspect * Select aspect
 This field cannot be empty.

Identifier *

Translation variable

Name

Occurrence ☐ May be created multiple times

▼ **Permissions**

AND group Owner Parent rights

ID	User/group	Rights	
9999	Everyone	RWDEP	

- ☒ View (R)
- ☒ Change (W)
- ☒ Delete (D)
- ☒ Move (E)
- ☒ Set permissions (P)

The *Aspect mapping* dialog box opens.

2. Click the *Select aspect* button.

The pick list of available aspects opens.

3. Select a suggestion.
4. Enter a technical name in the *Identifier* field.

Information

Only uppercase letters are possible.

- 5.

Enter a translation variable into the *Translation variable* field.

Information

Option 1: Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.

Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

6. Option 1: If necessary, enable the option *May be created multiple times*.

If this option is enabled, the behavior of the aspect in the form changes. A plus icon appears that can be used to add the aspect to the metadata form multiple times.

This can make sense if you've created an aspect for telephone numbers, for example. Instead of creating a separate aspect for all types of telephone numbers, use a basic type and enable the option *May be created multiple times* for it. Users can add as many telephone numbers as they'd like, as needed.

Please note

The view for the aspect must be created with the *List* type if you want to enable the option *May be created multiple times* for aspect mapping.


Option 2: If necessary, edit the permissions settings for the aspect mapping.

With the default settings, the aspect mapping can be used and seen by everyone.

7. Click *Save* to save the aspect mapping.
8. Add all the aspects you need for the metadata form in this way.

Create views


Form

 COURSE

Content

Usage


Default values

 Delete metadata form

> Overview

> Aspect mappings

▼ Views

 Create view



Identifier

No contents available 😊

Once all the required aspects have been assigned to the metadata form, you have to create views for the form.

Method

1. Click *Create view*.

Create view

☒ Default view (EDIT)

☐ View for the viewer pane in the client (VIEW)

☐ View for creating new entries (CREATE)

☐ Assign any name

Label *

EDIT

OK

Cancel

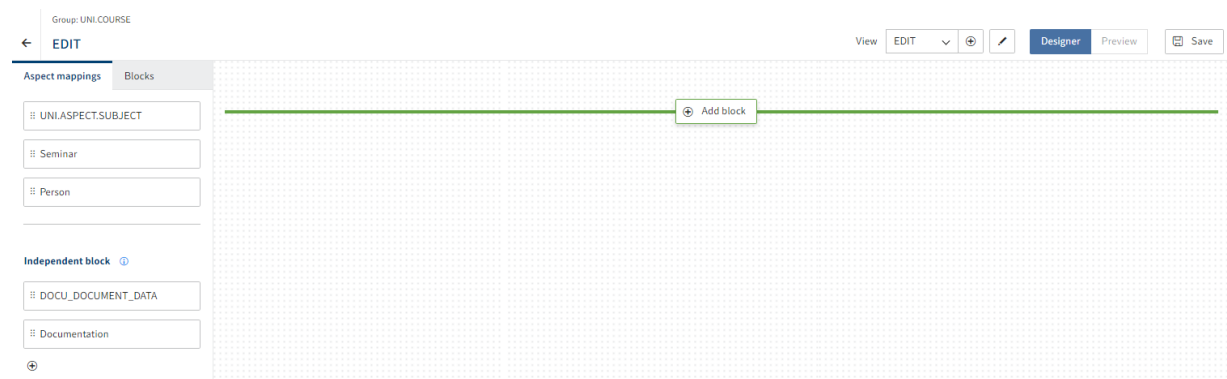
The form designer (gen. 2) opens. The *Create view* dialog box is open.

2. Select a type via the radio buttons.

Choose from the following options:

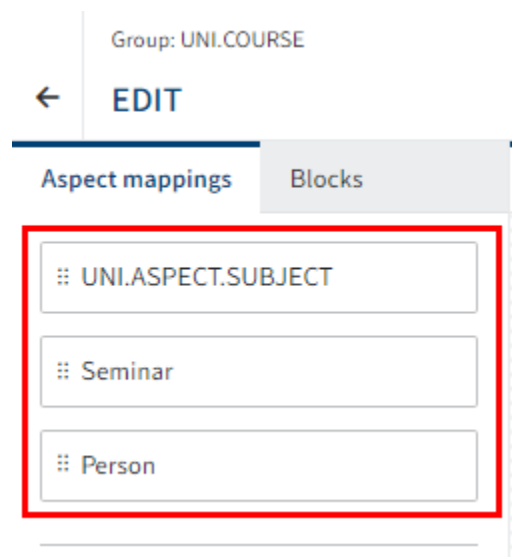
- Default view (EDIT)
- View for the viewer pane in the client (VIEW)
- View for creating new entries (CREATE)
- Assign any name: Create a custom type. In this case, you have to enter a name in the *Name* field.

3. Click OK.



This closes the dialog box. You are now in the form designer (gen. 2).

You will find more information about the items and functions of the form designer under Forms (gen. 2)



On the *Aspect mappings* tab, you will see the aspect mappings of the metadata form.

4. Drag an aspect mapping to the layout area using drag-and-drop.

Properties



Show title

- ☒ Show title
- ☒ Use name of the aspect mapping
- ☒ Title is collapsible
- ☐ Title is collapsed

Title

UNI.ASPECT.COURSE

⋮

Seminar

💾

Aspect mapping: Seminar

View

DEF

▼

✎

5. Under *Properties*, select a view from the *View* drop-down menu.

Optional: If necessary, edit the settings for displaying the name via *Settings > Show title*

Choose from the following options:

- Show title: If this option is enabled, the title of the aspect mapping is shown.
- Use name of the aspect mapping: If this option is enabled, the name of the aspect mapping is used as the title.
-

Title is collapsible: If this option is enabled, the aspect mapping can be expanded and collapsed.

- Title is collapsed: If this option is enabled, the aspect mapping is collapsed by default.

6. Repeat these two steps until you have placed all the desired aspect mappings.
7. Click *Save*.

The view is saved and is now available. The metadata form can be used in the clients.

Create dashboards

▼ Dashboards

+ Add dashboard		🔍
Identifier	Name	
No contents available 😊		

Method

1. Click *Add dashboard*.

Create dashboard

×

Label *

⚠ This field cannot be empty.

Translation variable

⋮

Display name

📁

OK

Cancel

The form designer (gen. 2) opens. The *Create dashboard* dialog box is open.

2. Enter a name for the dashboard.

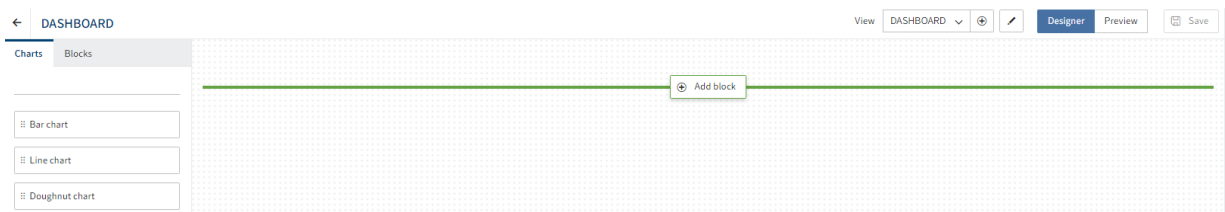
Optional: Enter a translation variable into the *Translation variable* field.

Information

Option 1: Select one of the available translation variables from the drop-down menu. The *Display name* field is completed automatically.

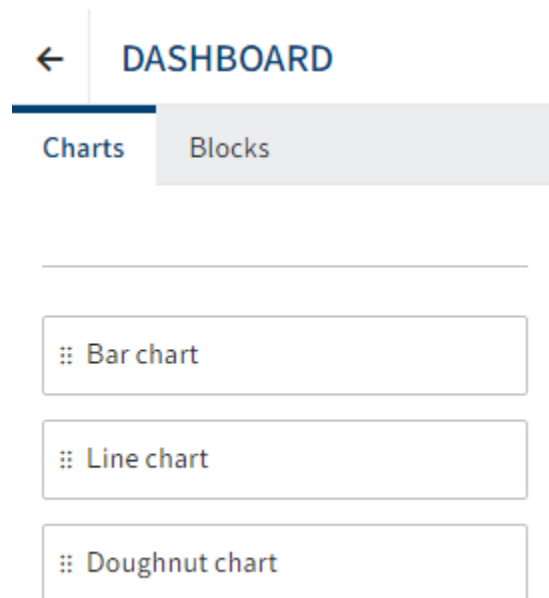
Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Display name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

3. Click OK.



This closes the dialog box. You are now in the form designer (gen. 2).

You will find more information about the items and functions of the form designer under Forms (gen. 2)



Under the *Charts* tab, you can select between *bar chart*, *line chart*, or *doughnut chart*.

4. Drag a chart type to the layout area using drag-and-drop.

Properties



Field type

elo.base.Chart

Component

1

elo.forms.analytics.BarChart



Alignment

2

Vertical



Breakdown by field *

3



This field cannot be empty.

Metric *

4

Count



Filter



No contents available

5



6

Color palette

Dark blue



7

Zuordnungsart

Keine Zuordnung



Title translation key

8



Under *Properties*, you can configure the charts. The *Field type* field is fixed and cannot be configured.

The following configurations are possible:

- 1 Component: You can change the selected chart type via a drop-down menu.
- 2 Alignment: Use the drop-down menu to select the alignment of the chart. In a bar chart, for example, you can select whether you want to arrange the bars vertically or horizontally.
- 3 Breakdown by field: The representation in the chart is based on a field with aspect mapping from the metadata form. Select a previously created field for the chart in the drop-down menu.
- 4 Metrics: Select a metric for the chart. You can select between the following metrics for the calculation basis of the chart: *Count*, *Average*, *Minimum*, *Maximum*, *Total*.

Information

Different metric selections are available depending on the field type. While *Count* is especially suitable for field types such as *keyword lists* or *text*, use *Average*, *Minimum*, *Maximum*, *Total* for numeric field types.

- 5 Filter: Click the plus icon to add a field with aspect mapping as a filter.
- 6 Color palette: Select a color scheme for the representation of the chart.
- 7 Mapping type: You can assign colors by clicking the pencil icon next to the *Mapping type* field.

Properties > Allocate color



Color palette

Different: Bright

Allocation type

Minimum and maximum value

No allocation

Minimum and maximum value

Threshold

Rule-based

#ea5545

Minimum point

Minimum value

#bdcf32

Select a color palette and a mapping type. Depending on the selected mapping type, you can assign specific colors for *minimum and maximum values*, *thresholds* and *rule-based values*.

8 Title translation key: Select a translation variable for the title of the dashboard.

9 Title: Select a title for the dashboard.

10 Subheader localization key: Select a translation variable for the dashboard subheader.

11 Subheader: Select a subheader for the dashboard.

Information

For fields with the assigned *localization key* field there are two optional methods:

Option 1: Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.

Option 2: Generate a new translation variable via direct input. Then, enter a name in the *Name* field and click the *Save* icon at the end of the field. The name is assigned to the translation variable and stored in the translation variable database.

12 Size: To set the size of the chart, choose between the options *Small width and height*; *Medium width, small height*; *Medium width and height*; *Large width, medium height*; *Large width and height*.

6. Repeat these two steps until you have placed all the desired charts.

7. Click *Save*.

The dashboard is saved and is now available. The dashboard can be used.

Configure usage


Form

 NEW_METADATA_FORM

Content

Usage

Default values

 Delete metadata form

Usage

☐ Folders

☒ Documents

☐ Relation

Restriction

☐ Usage determined by parent element

Restrict selection of metadata forms for child entries

No metadata form selected

Select metadata form

▼ Permissions

 AND group

 Owner

 Parent rights

ID	User/group	Rights	
9999	Everyone	RW	

☒ View (R)

☒ Change (W)

▼ Workflows

Default workflow

No workflow selected

Select standard workflow

Check-in workflow


No workflow selected

Select check-in workflow


In the *Usage* tab, you can select which data type the metadata form is used for, assign form-specific permissions, and assign workflows.

Configure default values

Form

 NEW_METADATA_FORM

Content Usage **Default values**

 Delete metadata form

▼ **Entry option defaults**

Entry type No entry type selected Select entry type

Font color System color Select font color

Document status/sorting Version control enabled/alphabetical ▼

Document path Standard document path Select document path

Deletion period Deletion period i

Retention period Retention period i

☐ Translate short name




☐ Enable quick preview of documents in the folder

Encryption key No encryption ▼

☐ Add to full text database

☐ Approval document

▼ **Entry permissions**

 AND group  Owner  Parent rights

ID	User/group	Rights
		<input checked="" type="checkbox"/> View (R)
		<input checked="" type="checkbox"/> Change (W)
		<input checked="" type="checkbox"/> Delete (D)

In the *Default values* tab, you can define preset values for the entries and specify permissions in the context of the entries.

Delete metadata form

Please note

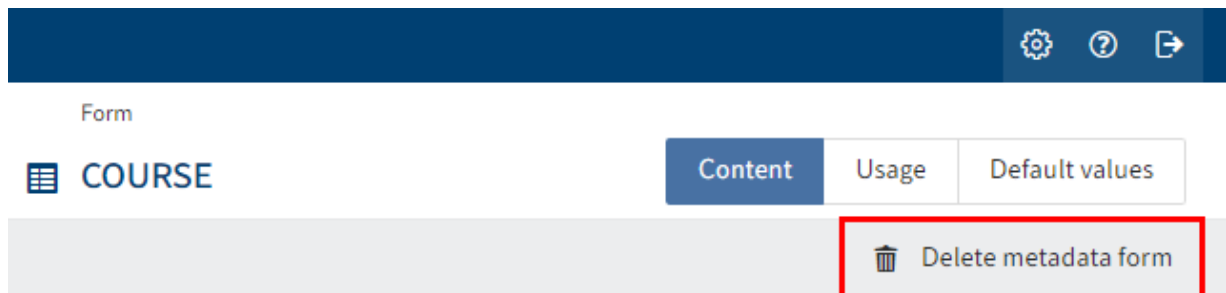
A metadata form can only be deleted if no entries in ELO are using the metadata form.

If there are entries using the metadata form in ELO and they have been marked for deletion, the entries have to be deleted permanently first before the metadata form can be deleted.

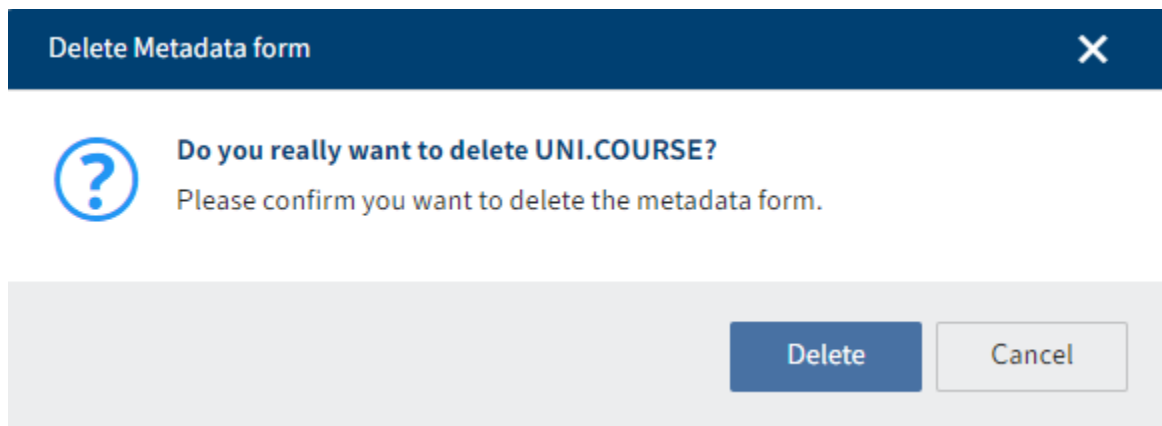
Method

1. Open the package containing the metadata form.
2. Click the metadata form you want to delete.

The *Form* dialog box opens.



3. Click *Delete metadata form* (recycle bin icon).



A prompt dialog box opens.

4. Confirm with *Delete*.

Result

The metadata form is deleted if possible.

Forms

Forms (gen. 2)

The forms (gen. 2) are the new default for displaying metadata.

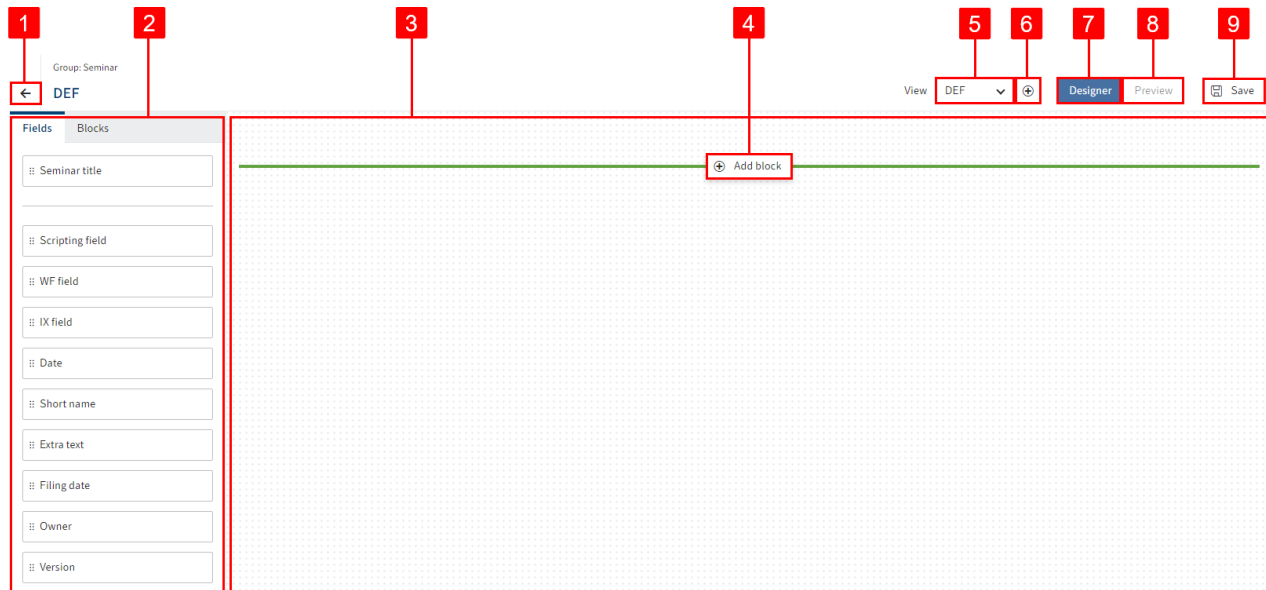
They are configured in the form designer (gen. 2) and are characterized by the following, among others:

- Flexible, modern form layout
- Responsive design on different devices
- Various validation options
- Fully functional preview

Information

The form designer (gen. 2) can be opened via *Views* in the *Aspects* and *Metadata forms* areas.

Form designer (gen. 2)



The form designer (gen. 2) contains the following control items:

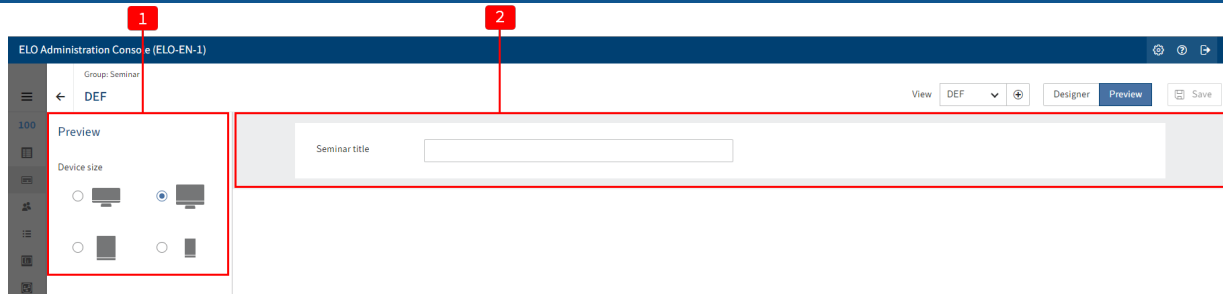
- 1 Close: The *Close* button (arrow icon) closes the form designer.
- 2 Fields/Items: You will find all available components for the form on the *Fields* and *Items* tab.
- 3 Layout area: In the layout area, you design the form.
- 4 Add block: Click the *Add block* button to add more layout formats in the layout area.
- 5 View: Select the view you want to edit via the *View* drop-down menu.
- 6 Create view: Click *Create view* (plus icon) to create a view.
- 7 Designer: If the *Designer* button is enabled, you are in editing mode. You can change the layout of the form and the field settings.
- 8 Preview: If the *Preview* button is enabled, you are in preview mode. You can test the form in different variants.
- 9 Save: Click *Save* to save the form.

Preview

Once you have placed and saved contents in the layout area, you can switch from editing mode to preview mode.



1. Click *Preview*.



Preview mode is enabled. You will see the form.

2. Test the form as needed.

The following items are available:

- 1 Device size: Display the preview for different device types.
- 2 Preview area: You see the form fields.

The form behaves as it would in actual use in the client. Fields can be completed to test their functionality.

Document date	<input type="text"/>	<input type="text"/>
Version *	<input type="text" value="a"/>	
	Invalid entry. Only decimal values.	

Example: A field with a validation function also checks whether the input is correct in the preview.

Add items

Placing a field or aspect mapping

Place fields or aspect mappings in the layout area depending on the context. In the following, we explain this process based on a field.

1. To place a field, drag it from the *Fields* tab to the layout area using drag-and-drop.
2. Drop it in the desired position.

Option: You can move aspect mappings in the same way.

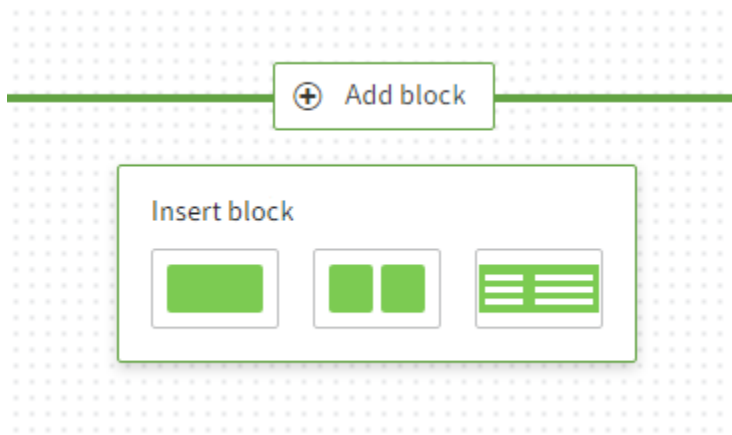
Add layout item

There are two ways to add a layout item (*block*):

- Using the *Add block* button
- Place blocks in the layout area using drag-and-drop.

The following briefly explains the approach using the *Add block* button:

1. In the layout area, click *Add block*.



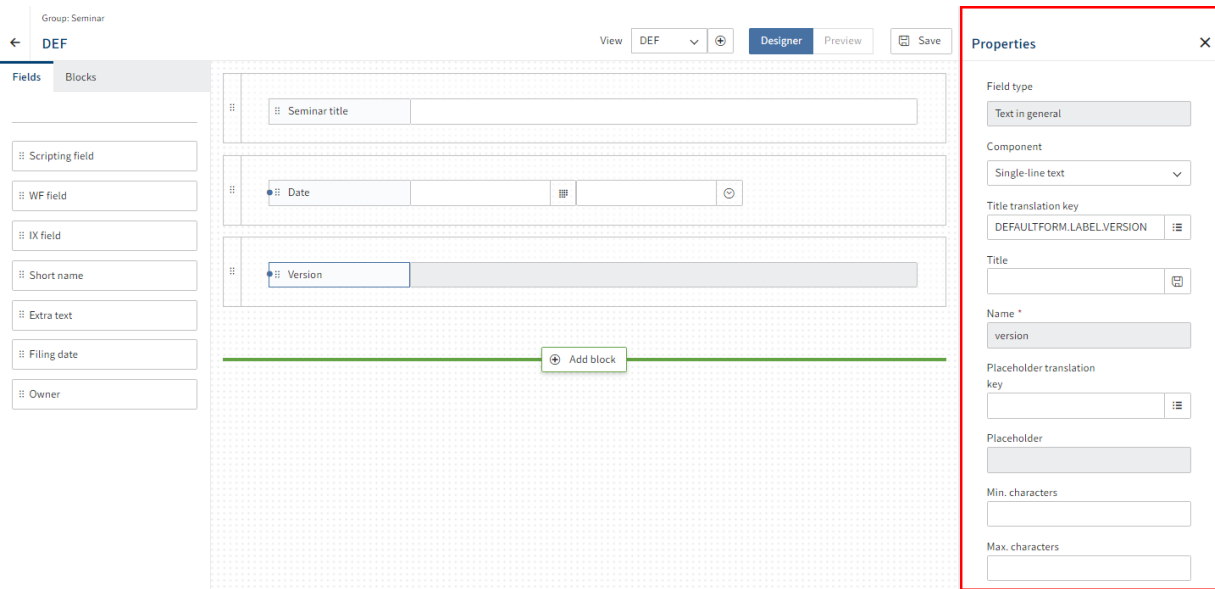
A drop-down menu appears.

2. Select one of the options.

The block is added.

Field properties

1. To edit the properties of a field, click the relevant field in the layout area.



The *Properties* area opens.

2. Edit the settings as required.

Different settings are available depending on the field type. Read the following sections for more information.

3. Click *Save* to save the data.

General field properties

Properties



Field type

elo.base.User

Component

elo.forms.field.User



Title translation key

DEFAULTFORM.LABEL.VERSIONO



Title



Name *

versionOwner

Placeholder translation

key



Placeholder

Field size

- ☐ Small
- ☒ Medium
- ☐ Large

☒ Disabled

☐ Required

The following properties are available for all fields:

- Field type: Shows the selected field type. This cannot be changed here.
- Component: Shows the selected data type. This can be changed for some fields.
- Title translation key: Shows the entered translation variable. Can be changed.
- Title: Shows the title depending on the *Title translation key* field.
- Name: Shows the technical name of the field.
- Placeholder translation key: Shows the entered translation variable. Can be changed.
- Placeholder: Shows the placeholder depending on the *Placeholder translation variable* field.
- Field size: This option lets you set the size of the field.
- Disabled: If the *Disabled* option is enabled, the field is set to *Read-only*.
- Required: If the *Required* option is enabled, the field is a mandatory field.

Information

Only the general properties can be changed for the *Relation* and *Check box* field types in the form designer (gen. 2).

Text in general, e-mail address, URL

Min. characters

Max. characters

Regular expression

Error message for regular
expression translation key



Error message for regular
expression

The following properties are available for the *Text* and *TextArea* data type fields:

- Min. characters: Indicates the minimum number of characters that have to be entered in the field.
-

Max. characters: Indicates the maximum number of characters that can be entered in the field.

- Regular expression: Via this field, you can define a regular expression that is used to validate the field content.
- Error message for regular expression translation key: Here, you define the message to be shown in the event that validation fails. This is the case if the input does not match the regular expression defined above. Enter a corresponding translation variable.
- Error message for regular expression: Shows the error message of the regular expression corresponding to the translation variable.

Integer

Min. value

Max. value

The following properties are available for *Integer* data type fields:

- Min. value: Indicates the smallest value that can be entered in this field.
- Max. value: Indicates the largest value that can be entered in this field.

Floating-point number

Min. value

Max. value

Show thousands
separators

☐

Number of decimal places

The following properties are available for *Double* data type fields:

-

Min. value: Indicates the smallest value that can be entered in this field.

- Max. value: Indicates the largest value that can be entered in this field.
- Show thousands separators: If this option is enabled, separators are shown for thousands.
- Number of decimal places: Defines how many decimal places will be shown.

Date

Min. date



Max. date



The following properties are available for *Date_Only* data type fields:

- Min. date: Indicates the lower limit for date selection.
- Max. date: Indicates the upper limit for date selection.

Date and time

Min. time





Max. time






The following properties are available for *Date_Time* data type fields:

- Min. time: Indicates the lower limit for date and time selection.
- Max. time: Indicates the upper limit for date and time selection.

Selection list

Name of keyword list *

 This field cannot be empty.

The following properties are available for *Choice* data type fields:

-

Name of keyword list: Enter the name of the keyword list to be used for this field in this field.

Information

You are currently creating and editing the keyword list outside the package view. You can find more information on *Keyword lists* in the [Keyword lists](#) section.

Relation

The general field properties are available for the *Relation* field. The relation target mapping is based on the field properties that were created when creating the field.

User

Restrict selection

- ☒ Both
- ☐ Groups
- ☐ User

User belonging to a group

Registered function

The following properties are available for *User* data type fields:

- Restrict selection: Restricts the selection of the field content. You can choose between *Both*, *Group*, or *User*.
- User from group: If you select *Both* for *Restrict selection*, you can select certain users from groups.
- Registered function

Remove items from the layout area

Depending on the context, you will find fields, aspect mappings, or layout items in the layout area. These items are removed in the same way. In the following, we explain this process based on a field.

1. Move the mouse cursor over a field in the layout area.



An X icon appears on the field.

2. Click the X icon.

The field is removed from the layout area.

Create tabs

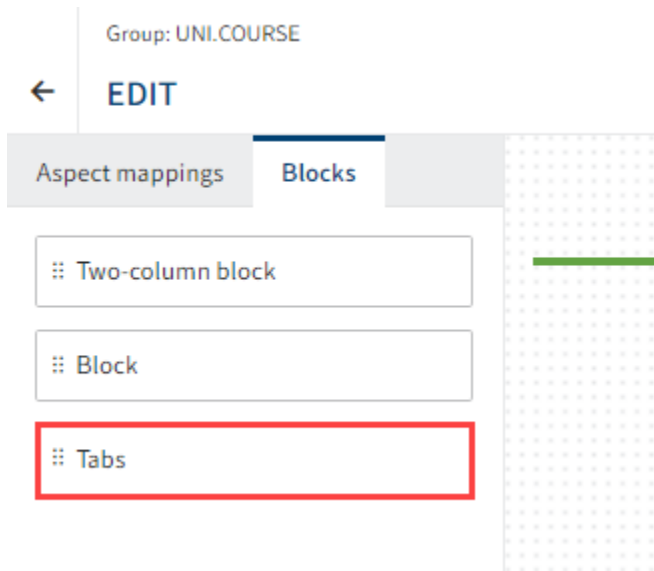
A form can be divided into tabs for a clearer structure. Follow the steps below.

Information

This function is currently only available for metadata form views.

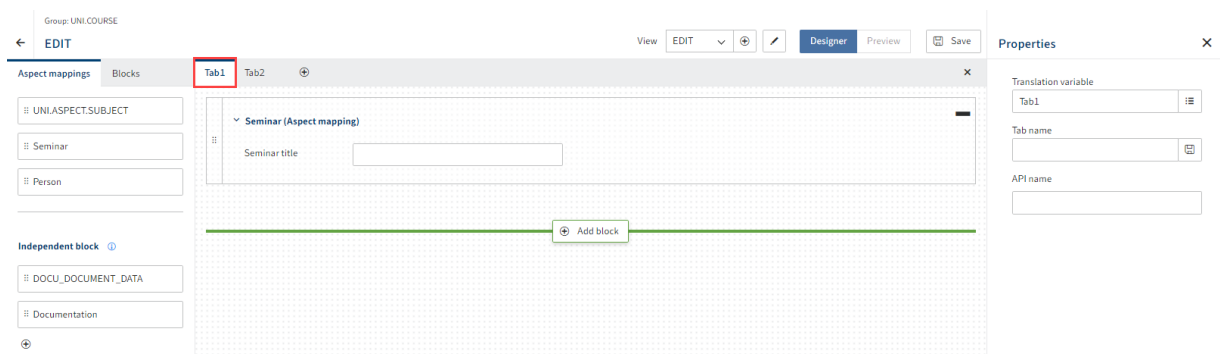
Create first tab

1. Open the metadata form view you want to edit.
2. Click the *Blocks* tab.



On the *Blocks* tab, you will see the *Tabs* item.

3. Drag the *Tabs* item to the layout area and place it above the existing aspect mappings.



The tab is shown.

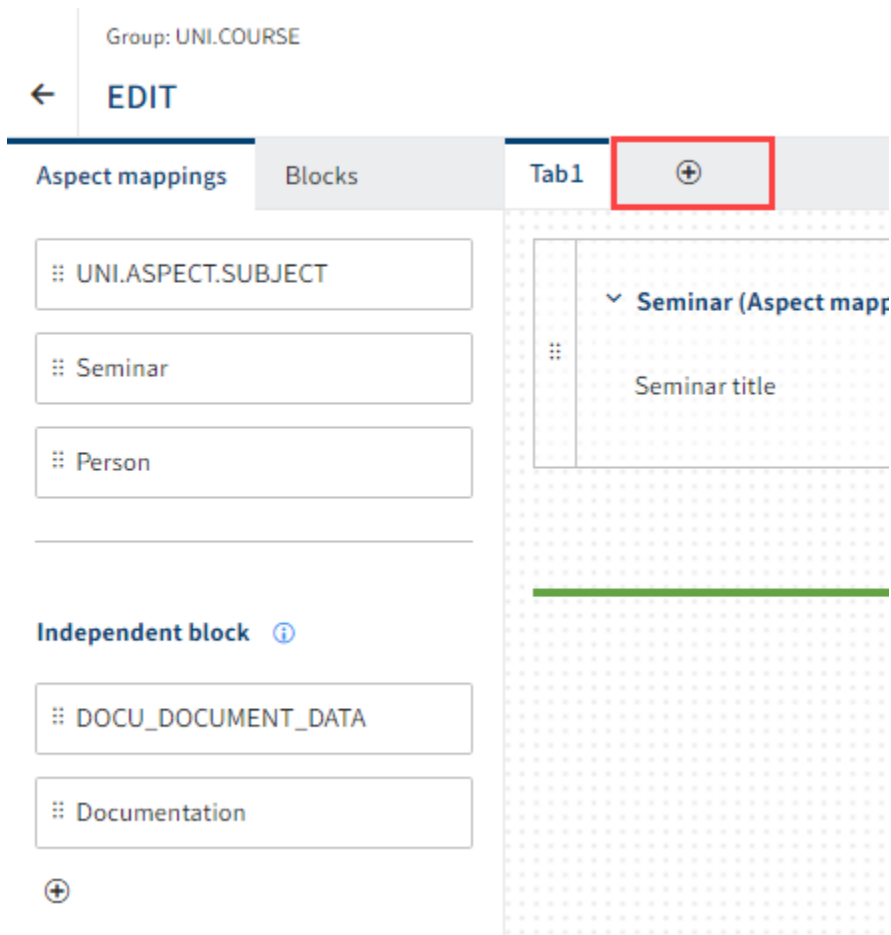
Option 1: Change the name of the tab under *Properties* > *Tab name*.

Option 2: Enter something under *Properties* > *API name*.

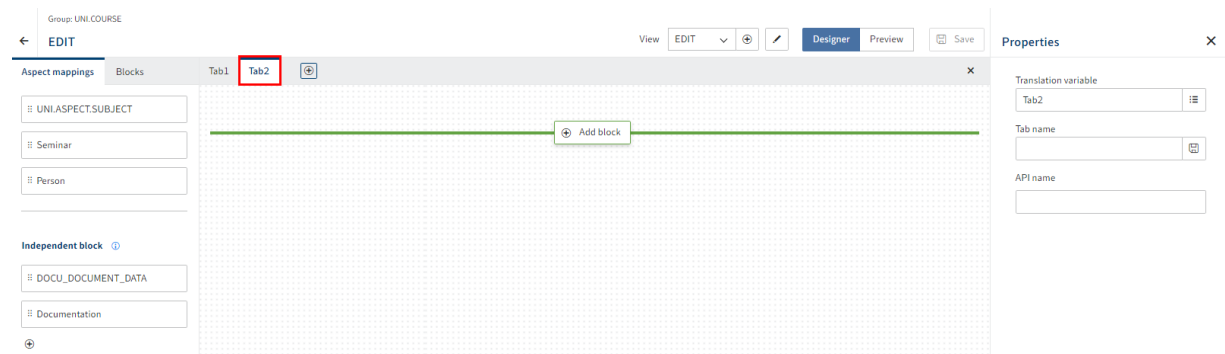
4. Click *Save*.

The first tab is created.

Add tabs



1. To add another tab, click the plus icon.



The tab is shown.

Option 1: Change the name of the tab under *Properties* > *Tab name*.

Option 2: Enter something under *Properties* > *API name*.

Option 3: Repeat the steps above until you have created all the tabs you want.

2. Click *Save*.

Multiple tabs have been created.

Placing aspect mappings

1. Drag an aspect mapping to the desired tab and drop it.

You can drag the aspect mappings to the respective tab in the layout area from both the layout area and the *Aspect mappings* tab.

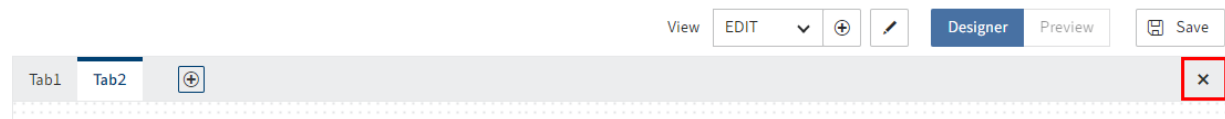
Optional: Repeat the step for additional aspect mappings as needed.

2. Click *Save*.

The created tabs are now filled with aspect mappings.

Delete tab

1. Click the tab you want to delete.



2. Click the X icon in the tab bar.

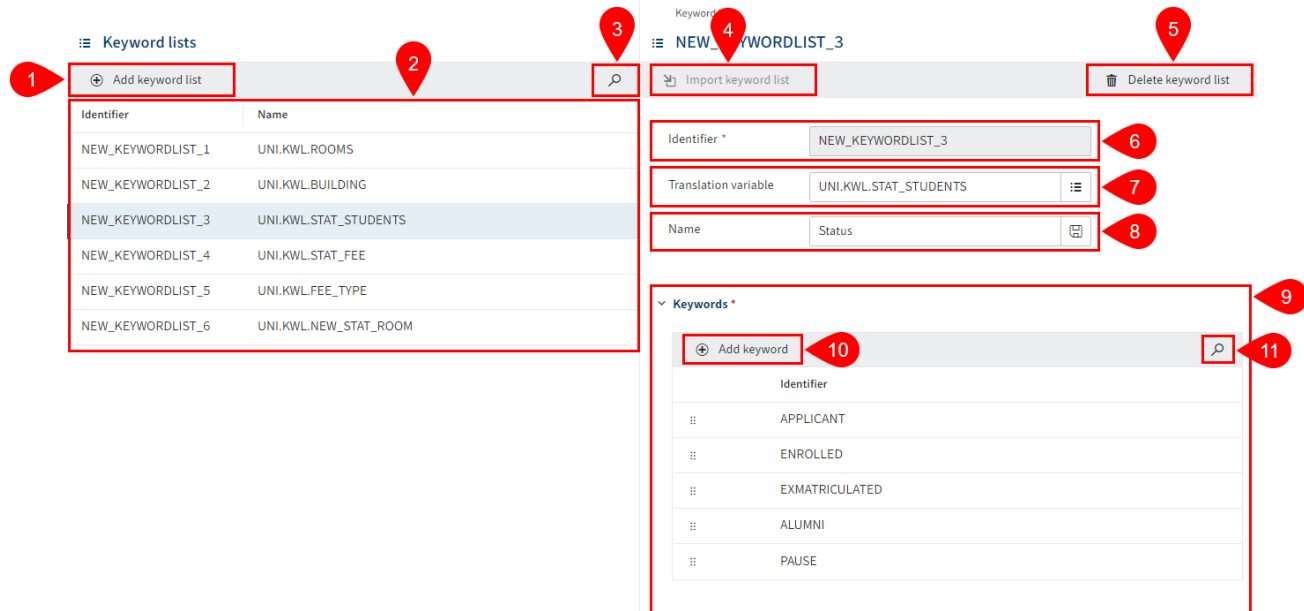
The tab is deleted.

3. Click *Save* to save the changes.

Keyword lists

Overview

Keyword lists are used to standardize entries and make it easier to enter metadata. Keyword lists are required for fields of the *Selection list* type. In addition, kanban views, for example, are based on keyword lists.



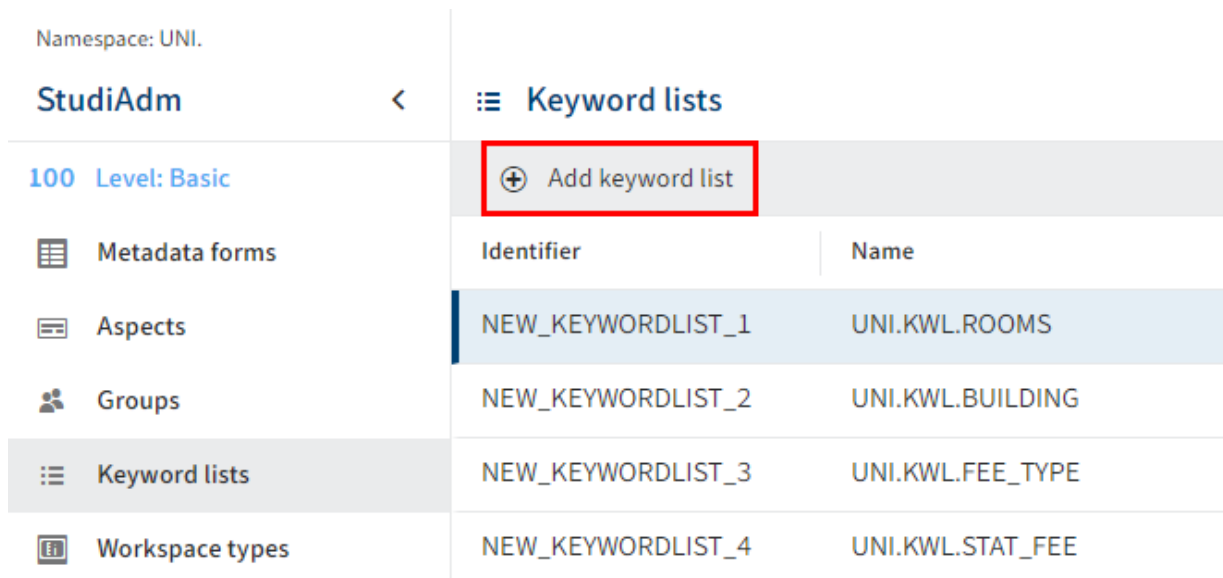
In the *Keyword lists* area, you create, edit, and manage the keyword lists within a package.

1. Add keyword list: Click the *Add keyword list* button to add a keyword. Each keyword list must contain at least one keyword.
2. Keyword lists: The table contains all the available keyword lists in this package.
3. Search for keyword list: You can search for keyword lists using the *Search* button (magnifying glass icon).
4. Import keyword list: The *Import keyword list* button allows you to import keyword lists as TXT files if there are presently no values for the current list yet.
5. Delete keyword list: Click the *Delete keyword list* button to remove the current keyword list.
6. Identifier: The technical name of the keyword list.
7. Translation variable: Translation variable for the display name of the keyword list.
8. Name: The display name of the keyword list.
9. Keywords: The *Keywords* list shows all the keywords in the list.
10. Add keyword: Click the *Add keyword* button to add a keyword to the keyword list.
11. Search for keyword: You can search for keywords using the *Search* button (magnifying glass icon).

Add keyword list

To add a keyword list, follow the steps below.

1. Open the *Keyword lists* area.



2. Click the *Add keyword list* button.

The *Keyword list* dialog box opens.

3. Edit the metadata of the keyword list:

- Identifier: Enter a technical name for the keyword list in the *Identifier* field.
- Translation variable: Enter a *translation variable* into this field. Alternative: Select an existing translation variable with the *List* button (list icon).
- Name: Enter the display name of the keyword list and click *Save* (floppy disk icon).

4. Add at least one keyword.

Alternative: Click the *Import keyword list* button to import a keyword list as a TXT file.

5. Click the *Save keyword list* button.

The keyword list is created.

Edit keyword list

You have the following options for editing keyword lists:

- [Add keyword](#)
- [Change the order of keywords](#)
- [Delete keyword](#)
- [Delete keyword list](#)

Add keyword

To add an entry to a keyword list, follow the steps below.

1. Under *Keyword lists*, click the keyword list you want to add an entry to.

Keyword list

NEW_KEYWORDLIST_1

Import keyword list Delete keyword list

Identifier * NEW_KEYWORDLIST_1

Translation variable UNI.KWL.ROOMS

Name Rooms

Keywords *

+ Add keyword

Identifier	Name
------------	------

The *Keyword list* dialog box opens.

2. Click the *Add keyword* button (plus icon).

The *Keyword* dialog box opens.

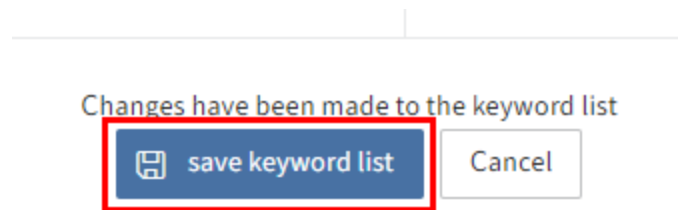
3. Enter a technical name in the *Identifier* field.
4. Enter a translation variable into the *Translation variable* field.

Alternative: Select an existing translation variable with the *List* button (list icon).

- 5.

Enter the display text of the translation variable into the *Name* field.

- Click *Save* (floppy disk icon).



- Click the *Save keyword list* button.

The keyword is added to the list.

Change the order of keywords

You can change the order of the keywords using drag-and-drop.

- Under *Keyword lists*, click the keyword list you want to add an entry to.

▼ **Keywords ***

⊕ Add keyword 🔍	
Identifier	Name
⋮ APPLICANT	
⋮ ENROLLED	
⋮ ALUMNI	
⋮ EXMATRICULATED	
⋮ PAUSE	

The *Keyword list* dialog box opens. Under *Keywords*, you can see all the keywords you have already created.

- Click on the keyword you want to move and keep the mouse button pressed.
- Move the keyword to the desired position.
- Release the mouse button.

The keyword is inserted at the new position.

- Click the *Save keyword list* button.

Delete keyword

1. Under *Keyword lists*, click the keyword list you want to remove a keyword from.

The *Keyword list* dialog box opens. Under *Keywords*, you can see all the keywords you have already created.

2. Click on the keyword you want to delete.

Keyword

INTERVIEW ×

 Delete keyword

Identifier *

Translation variable 

Name 

The *Keyword* dialog box opens.

3. Click the *Delete keyword* button.
4. Click the *Save keyword list* button.

The keyword is removed.

Delete keyword list

1. Under *Keyword lists*, click the keyword list you want to remove.

Keyword list

☰

📁 Import keyword list

🗑 Delete keyword list

Identifier *

Translation variable

Name

The *Keyword list* dialog box opens.

- Click the *Delete keyword list* button.

Delete Keyword list

⌕

Do you really want to delete ?

Please confirm you want to delete the keyword list.

Delete Cancel

The *Delete keyword list* dialog box opens.

- Click *Delete*.

The keyword list is deleted.