

Create and manage Custom Metadata

Updated 2 months ago



This functionality is available for **Custom Metadata Managers**.

Custom Metadata helps you organise, search for, and make better use of your content. To use this feature, your account must have the Item Banks functionality enabled.

Custom Metadata is created and managed at the tenant level. You can choose to have all tenant-level metadata flow to every Item Bank automatically, or have an Item Bank Manager define which metadata is available for each specific Item Bank (see relevant article [link](#)). The default configuration for your account is the "define per Item Bank" option. If you prefer a different setup, please contact the Service Desk.

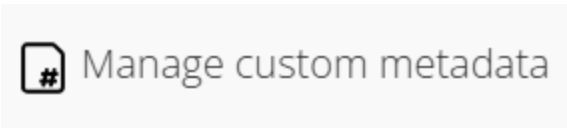
This article will guide you through the process of creating and managing your Custom Metadata.

Managing your Custom Metadata at a tenant level

To perform the following actions, you must have the Custom Metadata Manager user role.

1. Create a new custom metadata field

Locate and click the 'Manage custom metadata' option in the Settings or Admin drop-down menu.



This will take you to the custom metadata dashboard, containing information about custom metadata fields and values you have already created. You can search or order the contents of this dashboard by field name.

Custom metadata

Create custom field ▼

Active (1)

Archived (0)

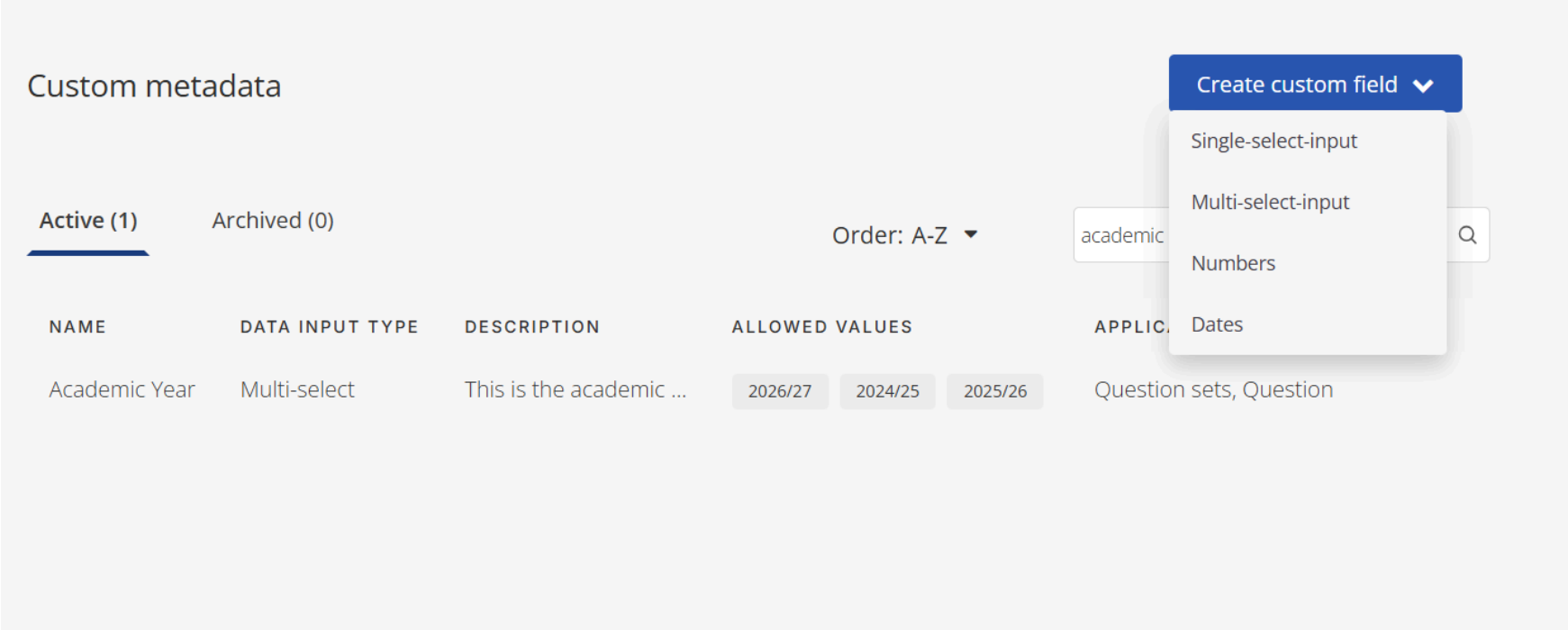
Order: A-Z ▼

academic | Q

NAME	DATA INPUT TYPE	DESCRIPTION	ALLOWED VALUES	APPLICABLE TO
Academic Year	Multi-select	This is the academic ...	2026/272024/252025/26	Question sets, Question

By clicking 'Create custom field' you can choose from four data input types:

- **Single-select:** You'll define a list of values for authors to tag their content. Authors can only select one value from the list.
- **Multi-select:** You'll define a list of values, but authors can select multiple values to tag their content.
- **Numbers:** Authors can enter a numeric value to tag their content.
- **Dates:** Authors can select a specific date to tag their content.



After choosing your desired data input type, you can enter the details for your new field. If you chose single-select or multi-select, you will also be able to define the available values.

Create multi-select-input field

Field name *

Language Assessed

Applicable to*

☒ Question

☒ Question sets

Description

Which language is being assessed by this question or question set?

Allowed values + Add value

Order: A-Z

Search allowed value

French

German

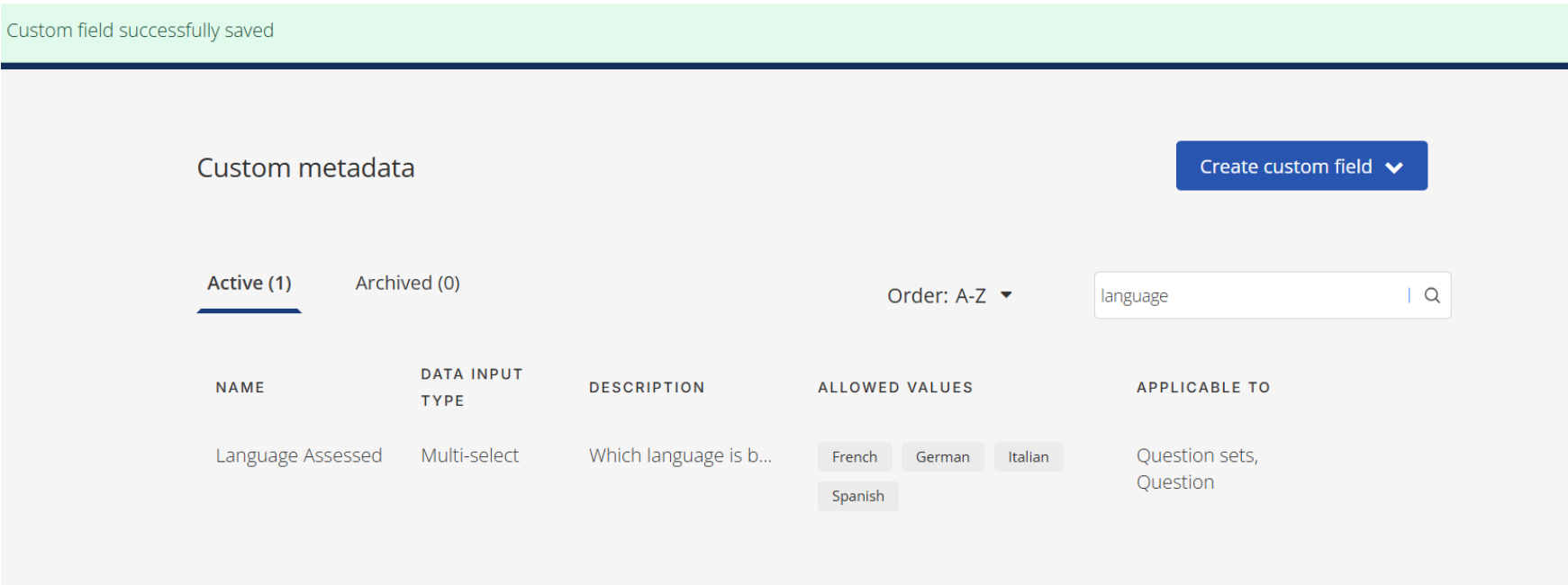
Italian

Spanish

Cancel

Save

After saving, you will see your field and its values (if applicable) in the dashboard.



2. Edit a Custom Metadata field

Please note: You can only edit or delete fields or values if they haven't been tagged to content yet. You can still use the "Archive" function to hide any unwanted metadata at any stage.

From the menu options, click 'Edit custom field'.

Custom metadata

Create custom field

Active (1)

Archived (0)

Order: A-Z

language

NAME	DATA INPUT TYPE	DESCRIPTION	ALLOWED VALUES	APPLICABLE TO
Language Assessed	Multi-select	Which language is b...	<div>French</div> <div>German</div> <div>Italian</div> <div>Spanish</div>	Question sets, Question

View details

Edit custom field

Archive

As long as the field or values have not been tagged to content then this view allows you to edit multiple elements including the field name, 'Applicable to' content type and the values (if applicable).

Click into the input field for the value to edit it directly.

To add more values after the initial field creation, click 'Add value', enter the name of the new value(s) and save.

Edit multi-select-input field

Field name

Language Assessed

Data input type

Multi-select-input

Applicable to

Question sets,Question

Description

Which language is being assessed by this question or question set?

Allowed values

+ Add value

Order: A-Z

Search allowed value

Swedish

Active (4)

Archived (0)

French

German

Italian

Spanish

Cancel

Save

3. Delete a Custom Metadata field or value

Please note: You can only edit or delete fields or values if they haven't been tagged to content yet. You can still use the "Archive" function to hide any unwanted metadata at any stage.

To delete an unused field, select the 'Delete' option from the three-dot menu in the custom metadata dashboard. For data security, we require you to confirm the decision to delete the unused field and its values (if applicable) before the action is enacted.

Custom metadata

Create custom field

Active (1)

Archived (0)

Order: A-Z

language

NAME	DATA INPUT TYPE	DESCRIPTION	ALLOWED VALUES	APPLICABLE TO
Language Assessed	Multi-select	Which language is b...	<div><div>French</div><div>German</div><div>Italian</div><div>Spanish</div></div>	Question sets, Question

View details

Edit custom field

Archive

Delete

This field has not been tagged against content. It can be edited, archived or deleted.

Delete metadata field permanently?

 **Deleting 'Language Assessed' cannot be undone**

Check the below to confirm you understand the consequences.

- ☐ Deleting this field will remove it from all content banks, delete values on this field and may make existing filters invalid.

Are you sure you would like to permanently delete the metadata from this tenant?

CancelDelete

To delete an unused value, select the 'Delete' option from the three-dot menu in the edit field modal.

Edit multi-select-input field

Field name

Language Assessed

Data input type

Multi-select-input

Applicable to *

☒ Question

☒ Question sets

Allowed values

+ Add value

Order: A-Z

Search allowed value

Active (4)

Archived (0)

French

German

Italian

Spanish

Archive

Delete

This value has not been tagged against content. It can be edited, archived or deleted.

Cancel

Save

4. Archive a Custom Metadata field or value

Archiving a field or its values makes them unavailable for tagging new content. However, any existing tags will remain, and you can still use the archived metadata for filtering.

To archive a field, hover over the field and then select the three dot menu on the right. From the menu options, click 'Archive'.

Custom metadata

Create custom field ▾

Active (1)

Archived (0)

Order: A-Z ▾

language | Q

NAME	DATA INPUT TYPE	DESCRIPTION	ALLOWED VALUES	APPLICABLE TO
Language Assessed	Multi-select	Which language is b...	<div><div>French</div><div>German</div><div>Italian</div><div>Spanish</div></div>	Question sets, Question

View details

Edit custom field

Archive

You will be informed of the implications and asked to confirm.

Archive metadata field

Once saved, the archived values cannot be applied on new content. Existing association of content with the archived values will be preserved and can be filtered by.

Are you sure you would like to archive this metadata field?

Cancel

Archive

You will now see the field and its values within the Archived tab. You can unarchive a field by selecting the option via the three dot menu.

Custom metadata

Create custom field ▾

Active (0)

Archived (1)

Order: A-Z ▾

langu | Q

NAME	DATA INPUT TYPE	DESCRIPTION	ALLOWED VALUES	APPLICABLE TO
<div>Language Assess...</div>	Multi-select	Which language is b...	<div><div>French</div><div>German</div><div>Italian</div><div>Spanish</div></div>	Question sets, Question

To archive a value, go to 'Edit custom field' then select 'Archive' from the three dot menu next to the intended value.

Edit multi-select-input field

Field name
Language Assessed

Data input type
Multi-select-input

Applicable to
Question sets,Question

Description
Which language is being assessed by this question or question set?

Allowed values + Add value

Order: A-Z

Search allowed value

Active (4)

Archived (0)

French

Archive

German

Italian

Spanish

Cancel

Save

Click 'Save' to enact the archive action - the value will appear in 'Archived' tab. Alternatively, click 'Unarchive' if you wish to undo the action.

Edit multi-select-input field

Field name
Language Assessed

Data input type
Multi-select-input

Applicable to
Question sets,Question

Description
Which language is being assessed by this question or question set?

Allowed values + Add value

Order: A-Z

Search allowed value

Active (4)

Archived (0)

French

Unarchive

German

Italian

Spanish

Once saved, the archived values cannot be applied on new content. Existing association of content with the archived values will be preserved and can be filtered by.

Cancel

Save

Once you've created the custom metadata at a tenant level, your Item Bank Manager can decide which fields and values are relevant for their specific Item Bank. See the article "Select Custom Metadata for your Item Bank" for details on how to do this.

Also see the article "Tagging content with Custom Metadata" to understand how Authors tag metadata against content.

https://support.inspera.com/hc/en-us/articles/30039463984541-Create-and-manage-Custom-Metadata

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