# Configuration and administration

Metadata forms and fields

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# Getting started

## Things to consider ahead of time

The following approach is recommended:

1. Which metadata forms do you need?
2. Which fields and settings do you want the metadata forms to have?
3. Which fields do you want to use in multiple metadata forms?
4. First, create all the field templates.
5. Next, create the metadata forms.
6. Now, add the fields to the metadata forms.

> **Information**
>
> You need to create the field templates required for the metadata forms before you create the metadata form. You can use field templates in different metadata forms.

# Create field templates

## Field templates



You can define templates for fields in the *Field templates* area. These templates can be used to create metadata forms in the *Metadata forms and fields* area.

**General**

Field group: Define a unique group name here.

> **Please note**
>
> The group names must be valid identifiers in JavaScript, as some ELO modules use the group names as JavaScript variables. Use the following list as a guideline.

- Maximum 40 characters
- Uppercase letters only
- No spaces
- No special characters
- No umlauts
- No "ß"
-

No dashes
- No numbers at the beginning of the name
- No reserved words in JavaScript

Name: Define a name for the field.

Translation variable: The *Translation variable* field is required if you need the contents of the *Name* field in multiple languages. Enter the corresponding key from the respective properties file.

Display mode: The following options enable you to specify the access and visibility settings for the field.

- Normal access: The field is visible and can be edited by users.
- Read-only: The field is visible but cannot be edited by users. The contents can be transferred to the field automatically.
- Hidden: The field is hidden and therefore cannot be edited by users. The field can be used to store data that the user does not need to see, for example.

## Input

Data type: Define the data type of the field here.

> **Information**
>
> For more information on field types, refer to the chapter *Field types*.

Relation: *Relation* type fields are used to link a field with the metadata of another entry.

The following conditions must be met before you can transfer metadata to a *Relation* type field:

- There must be at least one metadata form assigned the usage *Relation*.
- The required metadata forms must be entered in the *Relation* field in the field template.

> **Please note**
>
> You must create the metadata form and assign it the usage *Relation* before you create the corresponding fields.

Minimum length: Set the minimum number of characters that need to be entered in a field.

Maximum length: Set the maximum number of characters that may be entered in a field.

Regular expression: You can use regular expressions to validate the data that was entered in a field.

**Please note**

An error in the expression can cause problems when entering data. Check that the regular expressions you use work properly.

Mandatory field: Use this option to define whether you want a field to be mandatory.

List existing field values (F7 search): Press the F7 key when entering metadata to show a list of previous entries made in the field.

External data: In this field, you can specify which data should be imported from the document metadata (such as Exif JPG data) or from the full text information and applied to the fields automatically.

To read Exif data from a JPG file, you must enter the exact identifier of the variable in the *External data* field.

You could use *Image.Resolution* or *FILESIZE*, for example.

**Please note**

The identifiers may vary depending on the manufacturer. To determine the Exif identifiers, read the Exif data with a script (see script example in the publication *99 script examples*) or use an external program.

Default value: Define the default value for the field here.

**Please note**

When creating default values, avoid words that can act as operators for ELO iSearch (NOT, OR, AND). If words that can act as operators are used as values in fields, the corresponding filters in the ELO iSearch may result in errors.

This does not apply to fields with tokenization deactivated.

Tooltip: Create a tooltip for the field. This could contain information about the required format for entering data, for example.

Translation variable: The *Translation variable* field is required if you need the contents of the *Tooltip* field in multiple languages. Enter the corresponding key from the respective properties file.

## Properties

Field with high priority: If you enable the option *Field with high priority*, the information from the fields will be displayed after the file name in the tree view.

Show field when checking in: The field is displayed when checking in an entry. You can still enter metadata information at this point.

Pass on to child entries: This option enables child entries to use entries in this field. The fields must have the same group name for this to work.

Allow input inheritance from parent element: This option enables you to pass on inheritable entries from the parent field. The fields must have the same group name for this to work.

Automatically add * before search term: Adds the placeholder * before the query text when using this metadata form to search in ELO. This defines a search as *ending with*.

Automatically add * after search term: Adds the placeholder * after the query text when using this metadata form to search in ELO. This defines a search as *beginning with*. Example: If you enter *15* in this field, the search returns all documents with the entry *15* at the start of the field (ELO searches for *15**).

Disable tokenization: When this option is enabled, the contents of the short name are not split into tokens and the entire character string from the field is written to the full text database.

Exclude from iSearch: The contents of this field are excluded from ELO iSearch and the contents are not added to the full text database.

## Keyword list

The *Edit keyword list* link takes you to the page where you can edit the keyword list.

Entry only allowed with keyword list: Select this option to only allow entries to this field from keyword lists when entering metadata. This enables you to structure your metadata and helps prevent manual errors. You can create an individual keyword list for each field (group name). Do the same for each input field, i.e. create a keyword list for each field of a metadata form. This ensures that your metadata is standardized.

Translated keyword list: The keyword list is taken into account when using the automatic translation function. The terms in the keyword list must have been translated and entered in the translation table for this function to work.

Dynamic keyword list: A dynamic keyword list can only be integrated with the help of scripts. For more information, refer to the *ELO Indexserver programming guide* documentation, [Dynamic keyword lists](#) section.

## Field permissions

This is where you define the permissions to the field.

AND group: Select the *AND group* button to connect two or more groups. In this case, the assigned permissions only apply to users who are members of all connected groups. An AND group contains the overlap from the selected groups.

For more information on AND groups, refer to the *User administration* documentation in User administration > Concept for assigning rights and permissions > AND groups.

## Overview of metadata forms

In the *Overview of metadata forms* area, you can see which metadata forms the field template is being used in.
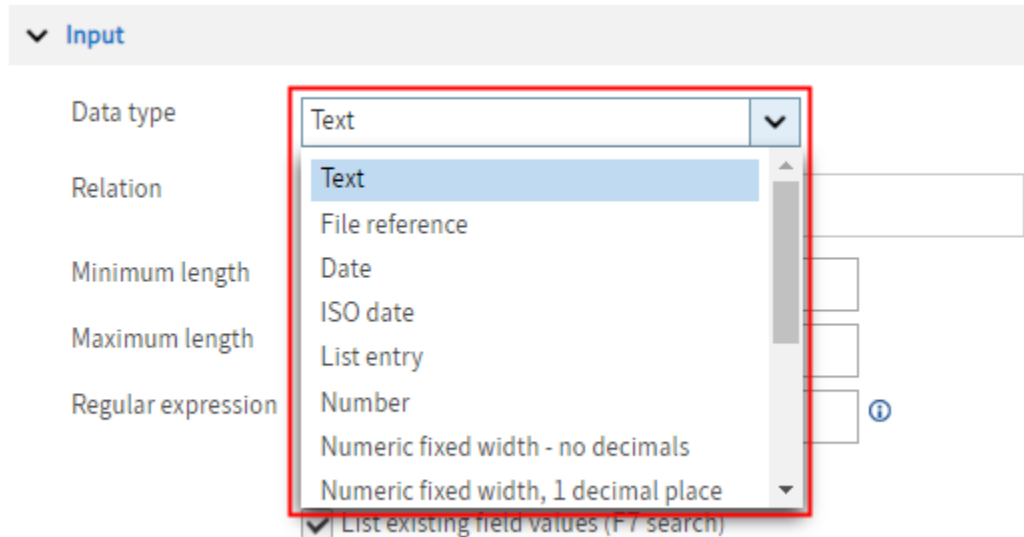
Save: Select *Save* to confirm new settings or changes to the metadata form.

Cancel: Click *Cancel* to discard any changes or new entries for a field template. Changes are not saved.

# Field types

ELO provides different types of fields. You should select the appropriate field type depending on the application and your requirements.



To select this type of field in the ELO Administration Console, go to *Field templates > Input > Data type*.

The following field types are available:

Text: In *Text* type fields, you can enter any characters.

File reference: Import a file reference from the file reference generator.

Date: In *Date* type fields, the user can select a date from an integrated calendar.

> **Please note**
>
> The field type *Date* is only provided for compatibility reasons. Please use the *ISO date* field type instead.

ISO date: In *ISO date* type fields, the user can select a date from an integrated calendar. The date is saved in ISO format (YYYYMMDD).

List entry: In the *List entry* type field, the user must store a hierarchical keyword list in a text file. The user selects keywords from this list when entering metadata.

> **Please note**
>
> The *List entry* field type is available for compatibility reasons. In newer ELO client versions, this field type is treated the same as the *Text* field type.

Number: In *Number* type fields, you can only enter numbers and number separators. If you enter any other characters in this field, a warning message will appear.

Numeric fixed width: You can only enter numbers and number separators to a *Numeric fixed width* type field. If you enter any other characters in this field, a warning message will appear. If you see this message, correct your entry. You must enter a value greater than zero to the *Maximum length* field to define the width.

Numeric fixed width, 1, 2, 4, or 6 decimal places: In a *Numeric fixed width, x decimal places* type field, you can only enter numbers and corresponding number separators. You must enter a value greater than zero to the *Maximum length* field to define the width.

If you enter a number when assigning metadata, it will automatically be completed according to the following convention:

- Number without decimal point: ELO will automatically add a decimal point and the selected number of decimal places (always zeros).
- Number with decimal point: ELO will add zeros after the last decimal until the required number of decimal places has been reached.

**Please note**

Using the type *Numeric fixed width, 1, 2, 4, or 6 decimal places* and configuring a setting in the *Maximum length* field at the same time can result in conflicts.

In such cases, at least the following must be taken into account for the setting in the *Maximum length* field:

- Places before the point
- The point
- The defined number of decimal places

If you expect multiple characters before the point, you will have to select a larger value for the *Maximum length* field.

## Example 1

The setting *Numeric, fixed width, 2 decimal places* is selected. If the user enters the value "1" in the field, ELO will change it to 1.00.

## Example 2

The setting *Numeric, fixed width, 4 decimal places* is selected. If the user enters the value "4.2" in the field, ELO will change it to 4.2000.

This ensures that entries always have the same number of decimal places.

Thesaurus: The *Thesaurus* field type provides word groups in a field which the user can select from a menu in a dialog box. The dialog box is opened by right-clicking the corresponding field.

User field: In a *User* type field, you can open a list of all active users and groups in ELO.

Relation: *Relation* type fields are used to link a field with the metadata of another entry.



The following conditions must be met before you can transfer metadata to a *Relation* type field:

- There must be at least one metadata form assigned the usage *Relation*.
- The required metadata forms must be entered in the *Relation* field in the field template.

> **Please note**
>
> You must create the metadata form and assign it the usage *Relation* before you create the corresponding fields.
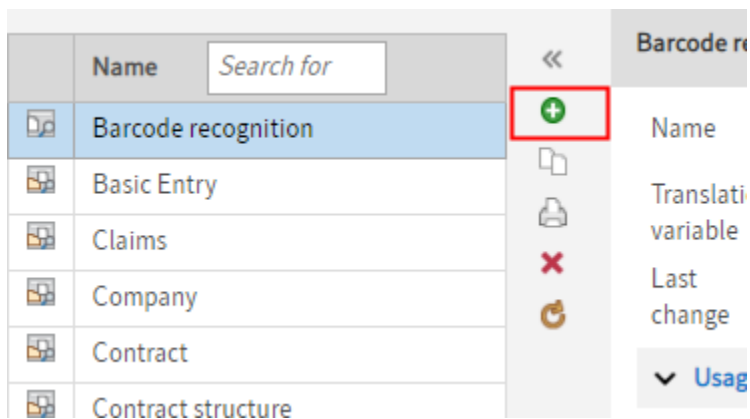
# Metadata forms

## Create metadata form

> **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.



1. Select the green plus icon *Add metadata form*.

The *New metadata form* dialog box opens.

1. Enter a name for the metadata form in the *Name* field.

1. Enter all other information for the metadata form in the *New metadata form* dialog box.

> **Information**
>
> Read the following information for notes on the corresponding fields and options.

1. Select *Save* to save the metadata form.

## Basic data

Name: Enter the name of the metadata form here.

Translation variable: This field is where you define a variable that can be used for customizing the program with scripts or for translations, e.g. the name of the metadata form.

Last change: In this field, you can see when the metadata form was modified last.

ID: Identification number of the metadata form. This is automatically assigned by the system.

GUID: This field contains the GUID of the metadata form, which is allocated by the system.

Save data as a table: Select *Save data as a table* if you do not want to save the data of the entries filed with this metadata form in the usual database structure (*objkeys* table). The entries are saved to a flat database table instead. This database table has one column per index value and one row per document. This may be required in specific cases to optimize search performance.

> **Important**
>
> You cannot convert data back to the usual database structure. Check carefully if this setting is necessary in your case. You will find more information under ELO server - Installation and operation > Optimization > ELO metadata table.

## Use



Folders: If you enable this option, the metadata form can be used to enter metadata for folders.

Documents: If you enable this option, the metadata form can be used to file documents.

Search: Select this option to use the metadata form for searches.

Relation: If this option is enabled, you can establish a link between the metadata form and *Relation* type fields. With *Relation* type fields, you can only select metadata forms in which this option is enabled.

Relation fields establish a connection to the corresponding relational metadata forms. Relation fields can be used to display the priority fields of the associated metadata form as a keyword list. You can recognize relation fields by the chain icon.

> **Information**
>
> Double-click to transfer an entry from the keyword list to the field. Only the short name is copied into the field. You can sort the keyword list using the columns.

## Restriction

Usage determined by parent element: If the option *Usage determined by parent element* is enabled, then this metadata form is only available if you file or create a child entry in a folder that is restricted to this metadata form.

See the option *Restrict selection of metadata forms for child entries*.

Restrict selection of metadata forms for child entries: Enter which metadata forms may be used for the child entries here.

Enter the metadata form you want to use in the *Enter name of metadata form* field. ELO suggests possible metadata forms as you type.

Click a suggestion to add the respective metadata form to the list. To remove the metadata form from the list, select the X icon to the right.

## Dashboards

Dashboards (gen. 2) can also be created for metadata forms (gen. 1).
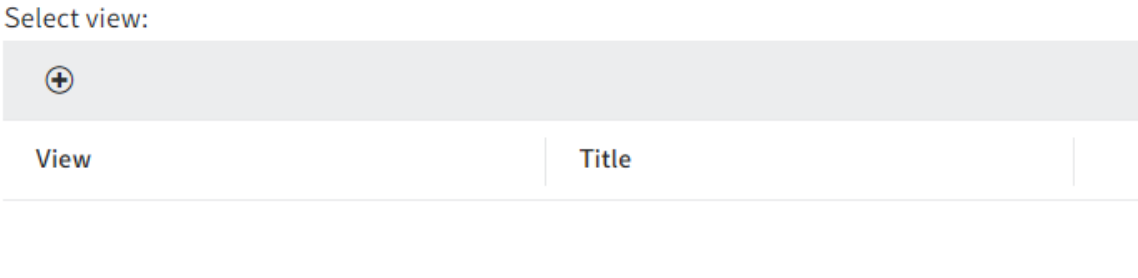
Go to dashboard designer: Select this link to create dashboard views for metadata forms (gen. 1).

The individual steps are described in the following.

### Create a dashboard

Dashboards belong to views. So, first you have to create a view. Note the following steps for creating a dashboard.

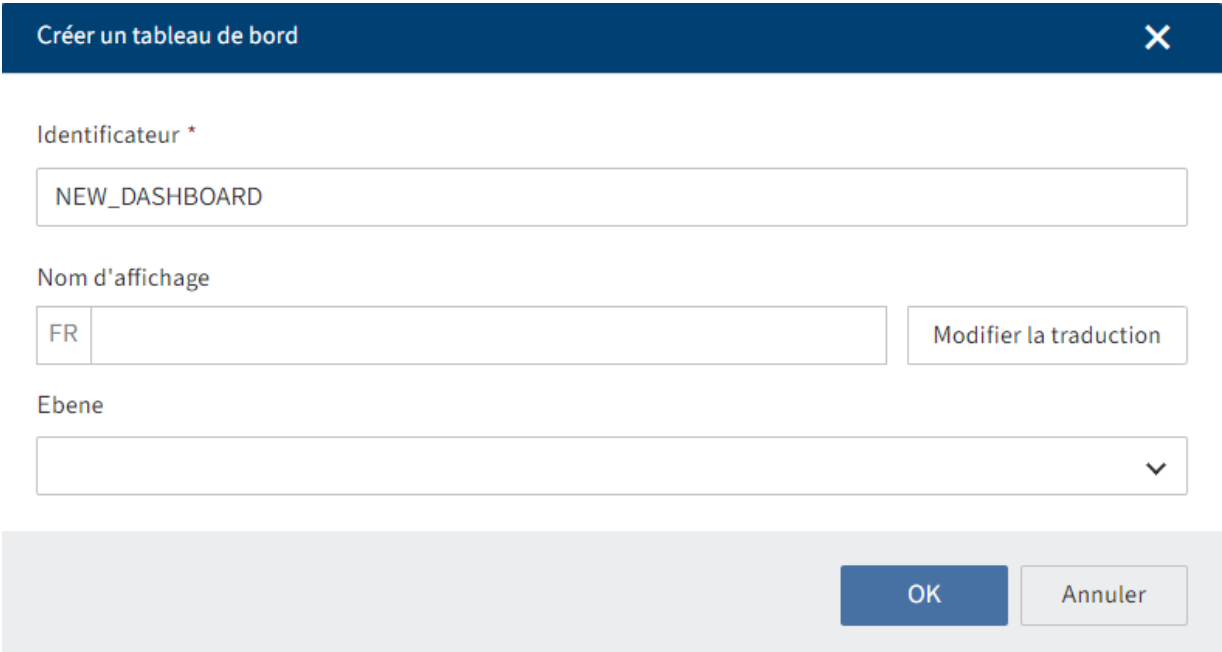1. Open the *Go to dashboard designer* link.

   Select view:

   ⊕

   | View | Title |
   |------|-------|

   The *Form designer* page opens in a separate tab.

2. Select the plus icon.

   **Créer un tableau de bord**                              ✕

   Identificateur *

   NEW_DASHBOARD

   Nom d'affichage

   | FR |  | Modifier la traduction |

   Ebene

   [                                                    ⌄ ]

   [ OK ]   [ Annuler ]

   The *Create view* dialog box opens.

3.

Enter a technical name in the *Identifier* field.

> **Information**
>
> Only capital letters (without umlauts and special characters), numbers, and underscores are allowed. The first character must be a letter.

4. Enter a display name in the *Display name* field.

   Optional 1: If you want to offer translated texts, you can enter a translation via *Edit translation*. You will find more information under ELO packages > Other topics > Translations > Use translation variables.

   Optional 2: If the metadata form is used in a package and you want to assign it to a level, select a level via *Level*.

5. Select *OK*.

6. The form designer (gen. 2) opens.

   On the *Charts* tab, you can choose between the following chart types:

     ◦ Bar chart
     ◦ Line chart
     ◦ Doughnut chart

7.
   Drag a chart type to the layout area using drag-and-drop.



8.

Under *Properties*, you can configure the chart.

The following configurations are possible:

- Component: You can change the selected chart type at a later point.
- Alignment: In a bar chart, for example, you can select whether you want to arrange the bars vertically or horizontally.
- Breakdown by field: 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. Additional settings are available depending on the field type selected.
- Metric: 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.
- Filter: Select the plus icon to add a field with aspect mapping as a filter.
- Color palette: Select a color scheme for the chart.
- Mapping type: You can assign colors by selecting the pencil icon next to the *Mapping type* field. You will find more information in the following [Configure mapping](#) section.
- Use field name: If this option is enabled, the display name of the selected field is used as the title of the chart.
- Identifier: Enter an identifier for the chart. It is automatically added to the translation variable.
- Title: Select a title for the dashboard. Otherwise, the identifier is shown. You can edit the translation as needed via the pencil icon.
- Subheader: Select a subheader for the dashboard as needed. This can help users better understand the purpose of the chart. You can edit the translation as needed via the pencil icon.
- Size: Select a size for the chart. This determines how the chart is arranged on the dashboard relative to other charts. The way the charts are arranged adapts to the size of the screen.

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

10. Select *Save*.

The dashboard is saved and is now available.

1. To close the form designer, close the corresponding tab.

**Configure mapping**

For color palettes, you can assign specific colors data values. This makes sense for multi-color color palettes.

Enregistrer

Propriétés › Assigner une couleur

✕

Gamme de couleurs

| ▌▌▌ Gradient : vert-jaune-rouge | ☰ |

Type d'association

| Valeur min. et max. | ⌄ |

Point max.

| Valeur max. | ⌄ |

| 🔴 #ea5545 | ☰ |

Point min.

| Valeur min. | ⌄ |

| 🔵 #27aeef | ☰ |

1. Select the pencil icon beside the *Mapping type* field.

2. Select a mapping type.

   ◦ Minimum and maximum value: Assign the minimum value a different color than the maximum value.
   ◦ Threshold: Define a threshold. All values below the threshold are assigned a different color than the values above the threshold.
   ◦ Rule-based: Define one or more rules as to which color should be assigned to which value/value range.

3. Select *Apply*.

The mapping type is saved.

For more information on how to create dashboards, refer to ELO packages > Metadata > Metadata forms > 'Content' tab > Create dashboards

# Add fields



A preview of the metadata form is displayed in the left pane. You can modify the metadata form by moving the fields. You can move fields and the names of fields using the mouse.

> **Information**
>
> Before you use the fields in the *Metadata forms and fields* area, you need to define the templates for the fields in the *Field templates* area. Before you start creating fields, you should have finalized all the settings for the metadata forms.

Move fields

1. Select the relevant field.

2. Position the cursor on the field.

   The cursor turns into a cross with four arrows.

3. Click and hold down the left mouse button.

4. Drag the field to where you want it on the metadata form.

5. Release the mouse button.

   The field is now at the correct position on the metadata form.

> **Information**
>
> Move field names in the same way.

Create fields

1. Select the required tab on the metadata form.

> **Please note**
>
> You can use up to 200 fields on each metadata form. When numbering fields, it is important to note that 51 to 60 are hidden fields reserved for scripts.

   Optional: Create a new tab by selecting *Add tab* to the right of the metadata form preview.

2. Select *Add field* to add a new field to the metadata form.



This creates a new field marked *New*.

You can edit the settings for the fields in the *Field properties* area on the right-hand side.

1. Enter the required information for the new field.

> **Information**
>
> Refer to the following explanations of the field properties for the settings.

## Field properties

Field group: Select a group name from the list of available field templates in the *Field group* field. You can use the group name to search multiple metadata forms, assuming they all use the same

field template. You can also use the group name to provide the user with a keyword list for multiple metadata forms.

**Please note**

You can only use a field group once for each metadata form.

**Information**

Some field settings are in the *Fields templates* area.

Name: Enter the name of the field here.

Translation variable (name): If you want to provide the name of the field in multiple languages, enter a corresponding variable name here. There must be a properties file for those languages containing this variable.

Display mode: Define the status of the field here. The *Normal access* option means the field is visible and can be edited by users. If the *Read-only* option is selected, you cannot enter anything in the field. However, you can enter information in the field using a script, for example. If the option *Hidden* is selected, the field is not displayed. It is still possible to enter information using a script.

Tooltip: You can enter text in this field to be displayed as a tooltip whenever the user moves the cursor over the field.

Translation variable (tooltip): If you want to provide the tooltip in multiple languages, enter a corresponding variable name here. There must be a properties file for those languages containing this variable.

Field with high priority: If you enable the option *Field with high priority* under *Metadata forms and fields*, the information from the fields will be displayed after the file name in the tree view.

Show field when checking in: The field is displayed when checking in an entry. You can still enter metadata information at this point.

Mandatory field: Specify whether you want a field to be mandatory here. You should define this setting in the options for field templates.

Pass on to child entries: If the option *Pass on to child entries* is enabled, metadata information can be passed on to child entries.

Allow input inheritance from parent element: If the *Allow input inheritance from parent element* option is enabled, entries assigned this metadata form can inherit metadata from parent entries.

Default value: If you want a field to be automatically assigned a specific value, enter the corresponding value in the *Default value* field.

## Positioning

Edit the exact position of the field in the *Positioning* area. To help you, turn on the grid in the preview (*Turn grid on/off* button).

> **Information**
>
> If you want to see any changes you make here in preview mode, you need to save the metadata form.

Tab: Use the drop-down menu to select the tab you want the field to be displayed on.

Label column: This value specifies the horizontal starting position of the field name.

Label row: This value specifies the vertical starting position of the field name.

Input column: This value specifies the horizontal starting position of the field.

Input row: This value specifies the vertical starting position of the field.

Input width: This value specifies the width of the field in columns. If you enter *0*, the column width is automatically adjusted to fit the available space.

## Form permissions



Define the permissions for the metadata form in the *Form permissions* area.

Add user or group: Search for users or groups in the *Add user or group* field. ELO suggests possible users and groups as you type. Select a suggestion to add a user or a group.

User or group with permissions: You can see the users and groups with permissions to the metadata form in the *User or group with permissions* field. Edit the permission settings using the check boxes next to the *User or group with permissions* field.

AND group: Select the *AND group* button to connect two or more groups. In this case, the assigned permissions only apply to users who are members of all connected groups. An AND group contains the overlap from the selected groups.

For more information on AND groups, refer to the *User administration* documentation in User administration > Concept for assigning rights and permissions > AND groups.

Owner rights: Select *Owner rights* to add permissions for the user who created the metadata form.

Members of the group: Under *Members of the group*, you can see all users who are a member of the selected group.

## Entry options



Entry type (folder forms only): Define an entry type for folders in the *Entry type* drop-down menu.

Font color: Color for displaying the document type.

Document status/sorting: Select the document status here that will be applied to documents filed with this metadata form. Define the sort order for documents filed with the metadata form for folders.

Document path: Select the document path to be used with the metadata form. The default path is *basis*.

Deletion period: Enter the period after which the entry must be deleted at the latest.

Retention period: Enter the period the entry has to be retained for. The entry cannot be deleted until the period entered is up.

> **Please note**
>
> The retention period must end before the deletion period.
>
> To define the period, you can use the following syntax in the *Deletion period* and *Retention period* fields:
>
> +<number><unit of time>
>
> The following options are possible as the unit of time:
>
> • Y or J: years
> • M: Months
> • W: Weeks
> • D or T: days
>
> Example: +10Y = in ten years

Translate short name: If you enable this option, the short name is added to the translation table.

Enable quick preview for documents in the folder: If you enable this option, the first document in the folder is displayed in the right-hand program pane instead of a list of contained documents.

Encryption key: Select an encryption key here if you wish to encrypt documents filed with this metadata form. You can also select the *No encryption* option.

Add to full text database: Select this option to add documents filed with this metadata form to the full text database. This allows the documents to be found in a full text search.

Approval document: This setting corresponds to the *Author for approval documents* permission. Documents with this option can be edited by a user with the *Author for approval documents* right. With approval documents, an editor may continue to edit previous versions of a version-controlled document without other users in the repository being able to see it.

## Entry permissions

Define rights for the documents to be filed here.

> **Please note**
>
> These settings must be matched with the permissions for the metadata form and with the permissions for the field templates.

Add user or group: Search for users or groups in the *Add user or group* field. ELO suggests possible users and groups as you type. Select a suggestion to add a user or a group.

User or group with permissions: You can see the users and groups with permissions in the *User or group with permissions* field. Edit the permission settings using the check boxes next to the *User or group with permissions* field.

AND group: Select the *AND group* button to connect two or more groups. In this case, the assigned permissions only apply to users who are members of all connected groups. An AND group contains the overlap from the selected groups.

For more information on AND groups, refer to the *User administration* documentation in User administration > Concept for assigning rights and permissions > AND groups.

Owner rights: Select *Owner rights* to add permissions for the user who created the entry.

Parent rights: Select *Parent rights* to apply the settings assigned to the parent entry.

Members of the group: Under *Members of the group*, you can see all users who are a member of the selected group.

**Filing rules**



Create filing path automatically: If you select this option, folders will be created automatically if the path does not already exist when filing documents automatically.

Create reference path automatically: If you select this option, references will be created automatically if the path does not already exist when filing documents automatically.

Filing definition: You can see the current filing definition in the *Filing definition* field. Set the filing definition in the *Filing path* field. If required, you can create additional paths by selecting *Add reference path*.

Filing path: In the *Filing path* field, you can define a rule that will govern how documents are automatically filed to ELO. This is the filing path where documents filed with this metadata form are stored.

Example: `[¶Invoices¶]+LD(7,4)+[¶]+L1(1,1)`

The filing definition can contain fixed or variable components.

> **Information**
>
> For more information on filing definition syntax, refer to the chapter *Filing definition and fields*.

Add reference path: In addition to the filing path, you can create additional reference paths. Add fields for additional paths using the *Add reference path*.

> **Information**
>
> To remove a reference path or filing path from the filing definition, select the X icon to the right of the corresponding field.

Default workflow: Select the workflow that will be started when a document is filed with this metadata form.

Check-in workflow: Select the workflow that will be started when a document is checked in.

## Barcode Info

Barcode info: This field lists the rules defined using the barcode wizard. Define the barcode rules by selecting the button next to the display field.

> **Information**
>
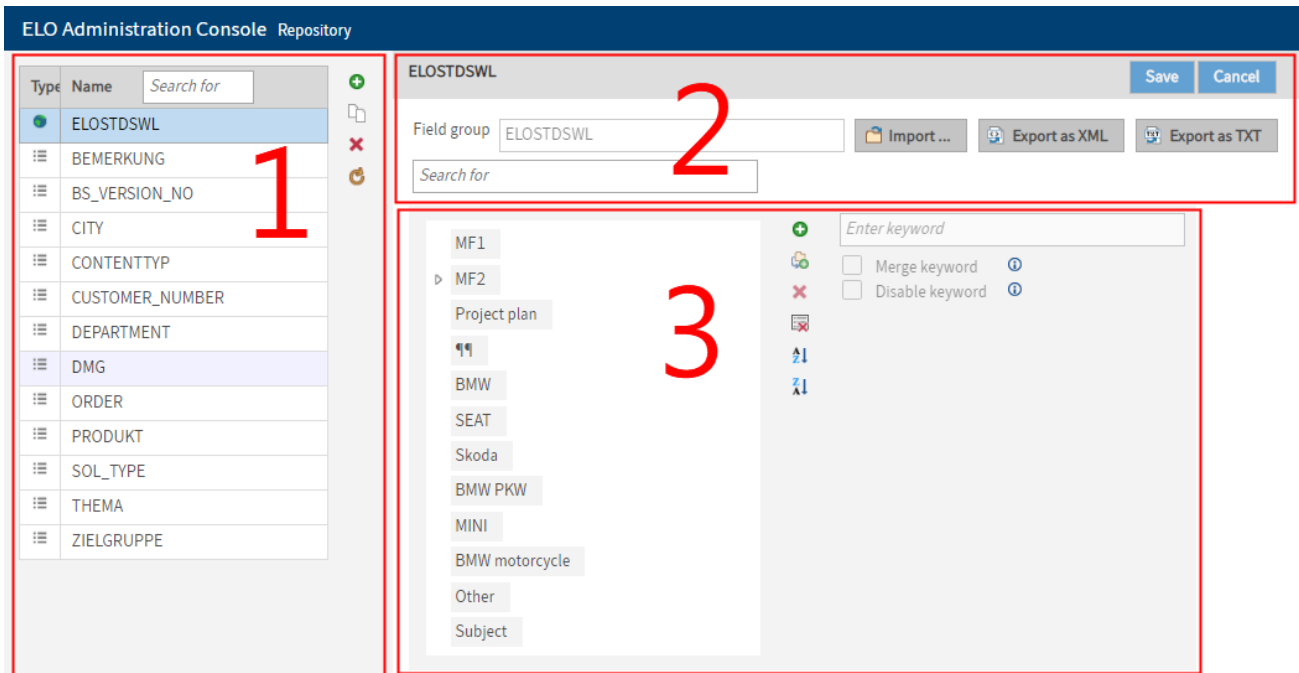> See the ELO Barcode section of the ELO Java Client documentation for more information on these settings.

## Overview of fields

This contains an overview of the fields assigned to the metadata form. The table also shows you the field IDs, which you might require for the filing definition.

# Keyword lists

## Keyword lists

Create new keyword lists and edit existing keyword lists in the *Keyword lists* area.



The *Keyword lists* area contains the following sections:

1. Table of keyword lists
2. General settings
3. Keyword list

These are explained below.

### Table of keyword lists

The *Table of keyword lists* contains all the available keyword lists. To edit a keyword list, select it in the list.

Search for: You can search the list using the *Search for* field.

Add keyword list (green plus icon): Select the *Add keyword list* button to create a new keyword list.

Duplicate the selected keyword list (icon with two documents): Select the *Duplicate the selected keyword list* button to copy the settings of an existing keyword list and apply them to a new keyword list.

Delete the selected keyword list (red X icon): Select the *Delete the selected keyword list* button to remove the selected keyword list.

Reload data from server (yellow circle arrow icon): Select the *Reload data from server* button to reload the *Keyword lists* area.

## General settings

The *General settings* area contains the following settings:

Field group: Assign a name for the keyword list in the *Field group* field. Enter the group name of the relevant field template.

Import ...: Select *Import ...* to load keyword lists already saved in file format in the ELO Administration Console. This function supports the file types *XML* and *TXT*.

> **Please note**
>
> For technical reasons, an existing keyword list is overwritten when you import a keyword list. This is why the *Import keyword list* dialog box opens when you import a keyword list. To continue the import process, select *Import....*

Export as XML: Select *Export as XML* to save the selected keyword list as an XML file.

Export as TXT: Select *Export as TXT* to save the selected keyword list as a TXT file.

Save: Select *Save* to save the keyword list.

Cancel: To discard the last changes you made, select *Cancel*.

Search for: You can search the keyword list in the *Search for* field.

## Keyword list

The *Keyword list* area contains the actual keyword list. You can add or edit keywords here.

Add keyword (plus icon): Select *Add keyword* to add new keywords. Enter the keyword to the *Enter keyword* field.

> **Please note**
>
> When creating keyword lists, avoid words that can act as operators for ELO iSearch (NOT, OR, AND). If words that can act as operators are used as values in fields, the corresponding filters in the ELO iSearch may result in errors.
>
> This does not apply to fields with tokenization deactivated.

> **Information**

Metadata 2.0 does not recognize keywords which contain a pilcrow symbol (¶). Pilcrow symbols are used as a separator when multiple values are entered.

Add child entry (folder with plus icon): Select *Add child entry* to add child entries to a keyword.

Delete the selected keyword list entry and all child entries: (X icon): Click the X icon to delete the selected keyword. Existing child entries will also be deleted.

Delete keyword list completely (list icon with X icon): To delete the complete keyword list, select *Delete the keyword list completely*.

From A to Z, sort ascending (AZ icon): Select the *From A to Z, sort ascending* button to sort the keyword list alphabetically in ascending order.

From Z to A, sort descending (ZA icon): Select the *From Z to A, sort descending* button to sort the keyword list in reverse alphabetical order.

Enter keyword: Enter new keywords and child entries to the *Enter keyword* field. If you have selected a keyword or child entry, the respective name is displayed.

Merge keyword: If the option *Merge keyword* is enabled, the keyword is merged with the child entry that the user selects. The composite value is entered in the field. Field values can therefore be made up of a keyword and multiple child entries.

Disable keyword: If the *Disable keyword* option is enabled, the keyword or child entry is only used for classification purposes, but cannot be selected when entering metadata. For example, the user can navigate to a child entry using the disabled keyword and select it.

# Filing definition

## Basic information on filing definition syntax

Use the following structure for a filing definition:

```
[¶folder1¶folder2¶]+Lx(v,y)+ ...
```

> **Information**
>
> The pilcrow character ("¶") is used to separate folder levels. The keyboard shortcut for the pilcrow symbol is ALT + 0182. Alternative: Select the pilcrow symbol to the right of the *Filing path* field.

### Example 1

You want to file invoices in an alphabetical folder structure sorted by the first letter of the customer name. The *Sales* folder contains the child folder *Customers*. The *Customers* folder contains an alphabetical index.

The metadata form in this example uses the field *Customers*(L1).

**Filing path**



1. Enter the following path in the *Filing path* field:

   ```
   [¶Sales¶Customers¶]+L1(1,1)
   ```

The contents of the *Filing path* field are automatically applied to the *Filing definition* field when you exit the field.

> **Information**
>
> [ ... ]: The square brackets indicate defined folders. These folders must be exactly the same in ELO so that they can be found. They can be created automatically. To do this, the *Create filing path automatically* option must be enabled.
>
> ¶: The pilcrow character separates levels.
>
> +: The plus symbol links the fixed part of the filing definition with the variable part.
>
> L1 (1,1): ELO selects the first letter of the *Customers* field (1,1), i.e. the first letter of the customer name.

2. Select *Save* to save the changes to the metadata form.



Now, if a document is filed with this metadata form using the *Automatic filing* function, the filing definition applies.

For example, a document from the customer *Smith* will be automatically filed to *Sales// Customers//S*.

## Example 2

You have created a child folder for each customer within the *Sales* folder. Each of these child folders contains additional folders, such as *Invoices*, *Offers*, *Delivery notes*.

The metadata form in this example uses the fields *Customers* (L1) and *Document type* (L2).

1. Enter the following path in the *Filing path* field:

[¶Sales¶]+L1+[¶]+L2

> **Information**

The contents of the *Filing path* field are automatically applied to the *Filing definition* field when you exit the field.

[¶Sales¶]: ELO searches the repository for the *Sales* folder. The second pilcrow character indicates that a second level must follow.

+L1: The name of the child folder must match the contents of the first field (*Customers*).

+[¶]: ELO searches for another child folder.

+L2: The name of the child folder must match the contents of the second field (*Document type*).

2. Select *Save* to save the changes to the metadata form.

   Now, if a document is filed with this metadata form using the *Automatic filing* function, the filing definition applies.

   For example, an invoice for the customer *Johnson* is automatically filed to *Sales//Johnson// Invoice*.

## Fixed fields

The following variables relate to fields that exist on every metadata form. These variables can also be used for filing definitions.

- LK: Short name
- LD: Date
- LA: Filing date

# Filing to multiple folders

In ELO, you can file a document to several folders at the same time. ELO does not file multiple copies of the document. Instead, the same document is stored in different folders as references. If changes are made to a document, the changes also apply to all references to the document.

## Example

You want to file all orders for a single year to the *Orders* folder. The *Orders* folder contains a folder for each year.

You also want to file the orders as references in the corresponding customer folder.

The metadata form in this example uses the fields *Customer* (L1) and *Order date* (L3).

**Filing path**



1. To file documents to the *Orders* folder, enter the following path in the *Filing path* field:

   ```
   [¶Orders¶]+L3(1,4)
   ```

   The contents of the *Filing path* field are automatically applied to the *Filing definition* field when you exit the field.

   > **Information**
   >
   > [¶Orders¶]: ELO searches for the *Orders* folder.
   >
   > +L3 (1,4): The field *Order date* uses the ISO date (YYYY-MM-DD). This means that ELO needs to read four characters for the year, starting with the first (1,4).

**Reference path**

| Filing path | [¶Orders¶]+L3(1,4) |
| | Add reference path |
| Default workflow | [NO WORKFLOW] |
| Check-in workflow | [NO WORKFLOW] |

1. To create a new path, select *Add reference path*.

   The *Reference path 1* field appears.

| Filing definition | [¶Orders¶]+L3(1,4)\|[¶Customers¶]+L1 |
| Filing path | [¶Orders¶]+L3(1,4) |
| Reference path 1 | [¶Customers¶]+L1 |
| | Add reference path |

2. Enter the following path in the *Reference path 1* field:

   [¶Customers¶]+L1

| | ☑ Create filing path automatically |
| | ☑ Create reference path automatically |
| Filing definition | [¶Orders¶]+L3(1,4)\|[¶Customers¶]+L1 |
| Filing path | [¶Orders¶]+L3(1,4) |
| Reference path 1 | [¶Customers¶]+L1 |
| Reference path 2 | *Enter filing path* |
| | Add reference path |

The contents of the *Reference path 1* field are automatically applied to the *Filing definition* field and added to the filing path when you exit the field.

**Information**

|: If a filing definition contains multiple paths, each path must be separated with a pipe symbol ("|"). The ELO Administration Console creates the pipe symbol automatically as soon as you have entered a reference path in a corresponding field.

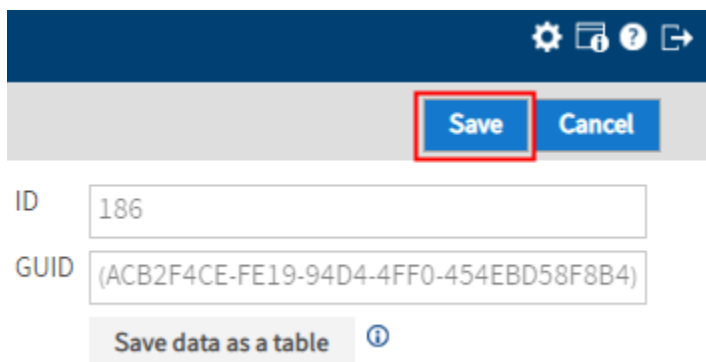To create the pipe symbol manually, use the keyboard shortcut: ALT+GR+ <.

[¶Customers¶]: ELO searches for the *Customers* folder.

+L1: The name of the child folder must match the contents of the first field (*Customer*).
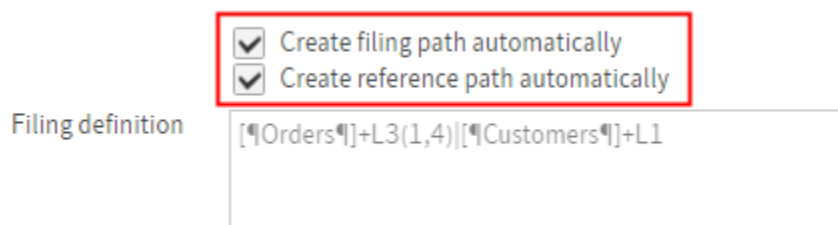
> **Information**
>
> Once you have created a complete filing definition with multiple paths, you can enter it in the *Filing path* field. The ELO Administration Console splits the paths automatically as soon as it finds a pipe symbol.

3. Select *Save* to save the changes to the metadata form.



Now, if a document is filed with this metadata form using the *Automatic filing* function, the filing definition applies.

An order for the customer *Allimports Inc.* from *2020* will be automatically filed to *Orders// 2020*, and as a reference to the *Customers//Allimports Inc.* folder.
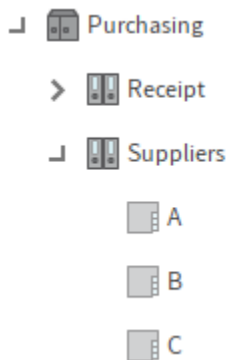
**Information**

When using variables in paths, it is recommended that you enable the options *Create filing path automatically* and *Create reference path automatically*.

# Filing definition by longest match

Assume you want to file delivery notes from your suppliers with a specific metadata form in alphabetical order. In addition, you want to distinguish between *S*, *Sm*, and *St*. This allows you to file suppliers such as *Smith*, and *Stiller* separately.

## Prepare folders

1. Create a *Purchasing* folder with a *Suppliers* child folder.



2. In the *Suppliers* folder, create a child folder for each letter of the alphabet. Also create folders named *Sm* and *St*.

   The metadata form in this example uses the field *Suppliers* (L1).



3. Enter the following path in the *Filing path* field:

   ```
   [¶Purchasing¶Suppliers¶]+L1(1,1)+[%]+L1(2,2)
   ```

   The contents of the *Filing path* field are automatically applied to the *Filing definition* field when you exit the field.

   **Information**

[¶Purchasing¶Suppliers¶]: ELO searches for the *Purchasing* folder and the *Suppliers* child folder.

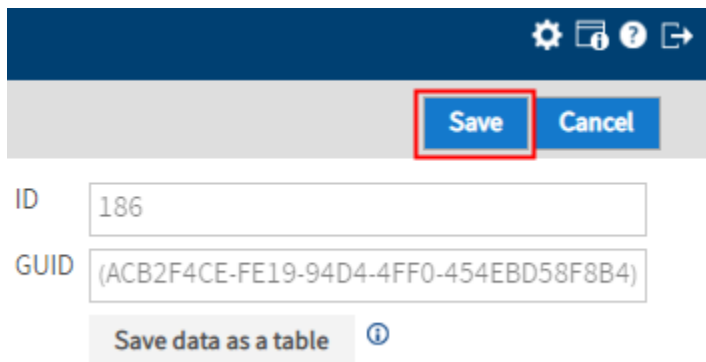+L1(1,1): ELO starts by checking the first character of the first field.

+[%]: The percent sign instructs ELO to file by the longest match. If it finds a match for the first character, ELO carries on checking.

+L1(2,2): ELO checks two characters from the second character in the first field.

With this filing definition, ELO checks whether a folder exists under the specified path (*Purchasing//Suppliers*) that matches the first three characters of the contents of the first field.

ELO uses the longest match for filing.

4. Select *Save* to save the changes to the metadata form.

Now, if a document is filed with this metadata form using the *Automatic filing* function, the filing definition applies.

A document for the supplier *Sanborn* can only be filed to the *S* folder. A document for the supplier *Smith* also has an S at the beginning. However, the match for the *Sm* folder is longer, so ELO files the document there.