



# ELO packages

Metadata



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# Aspects

## Introduction

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

ELO Administration Console Repository1  [Settings] [Help] [Logout]

▼ Packages

- Package administration**  
Create, export, import, and delete packages.
- Base**  
Basic package with the most important metadata forms and aspects.
- StudiAdm**  
Student administration

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

Namespace: UNI

**StudiAdm** < **Package overview**

100 Level: Basic [Export package](#) [Log](#)

- Metadata forms
- Aspects
- Groups
- Keyword lists
- Entry types
- Workspace types
- Teamspace templates
- Font colors
- Flows
- Translations

Level: Basic (100)

Metadata forms

Aspects

Groups

Keyword lists

Entry types

+ Add level

The package opens.

2. Select *Aspects*.

ELO Administration Console (ELO-EN-1) [Settings] [Help] [Logout]

Namespace: UNI

**StudiAdm** < **Aspects**

100 Level: Basic [+ Add aspect](#)

Identifier	Name
No contents available 😊	

The *Aspects* tab opens.

3. Select *Add aspect*.

Aspect

NEW\_ASPECT\_1

Delete aspect

Overview

Identifier \*

Name

The *Aspect* configuration area opens.

4. 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.

5. Enter a display name in the *Name* field.

Optional: If you want to offer translated texts, you can configure translated display names via *Edit translation*. You will find more information under [ELO packages > Other topics > Translations > Use translation variables](#).

6. Select *Save aspect*.

The aspect is created.

## Add fields

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

1. Select the aspect you want to edit.

The settings for the selected aspect open.

### Fields

+ Add field			🔍
Identifier	Name	Field type	
<i>No contents available</i> 😊			

2. Select *Add field*.

The screenshot shows the configuration page for a field named 'NEW\_FIELD'. The page has a left sidebar with various icons, a top navigation bar with a back arrow and the field name, and a main content area with several form fields. At the top right of the main area is a 'Delete field' button. The form fields are: 'Identifier \*' with the value 'NEW\_FIELD'; 'Name' with the value 'EN' and an 'Edit translation' button; 'Field type' with a dropdown menu set to 'Text in general'; 'Data type' set to 'Text'; and 'Default value' with an empty text box. At the bottom of the form is a checkbox labeled 'Exclude from iSearch'. Below the form, a message states 'The aspect has been changed.' with 'Save aspect' and 'Cancel' buttons.

The configuration area for the field 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 *Name* field.

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

- 5.

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

Choose from the following options:

- General text: 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: *Selection list* type fields are shown as pick lists, buttons, or radio buttons. A keyword list has to be configured.

### Information

If the *Selection list* (default) display type is selected, the *Autofill* function is available. The function is limited to a maximum of 40 suggestions for optimized performance.

- 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 boxes save Boolean values (*true* or *false*) in the form of an integer value:
  - Disabled: 0 (*false*)
  - Enabled: 1 (*true*)
- Long text: For fields with more than 255 characters.
- Time: For specifying time in the format HHmmssSSS. Leading zeros are used.
- Large decimal: For amounts of money and large numbers.

Optional: If necessary, you can configure additional settings via the following fields and options.

-



Default value: This value is automatically entered when the metadata form is shown. The value can be changed by the user.

- Exclude from iSearch: To not add the content of the field to the ELO iSearch search index, enable this option.
- Allow inheritance to child entries: Use this option to specify whether to also find child entries for these fields when using ELO iSearch.

#### Please note

Field contents are not inherited. The inheritance function only affects the search.

Example: You have a business object *contract 12346789* with the field *Contract number*. The child entries do not have this field. If you want to find the child entries when searching for the contract number, you need to allow *inheritance to child entries*.

#### Please note

For the inheritance function to work, the following requirements must be met:

- The parent metadata form must be enabled for use with business objects (*Metadata forms > Usage > Business object*).
- Inheritance for the fields of the aspect must be enabled (*Allow inheritance to child entries* option).
- The aspect mappings being passed on must be enabled in the parent metadata form. (*Usage tab > Inherit fields to child entries*)
- The *May be created multiple times* option must NOT be enabled.

- Translation variable: If necessary, select a translation variable that should apply for the *Comment* field. Alternative: Enter a new translation variable.
- Comment: If necessary, enter additional information in the *Comment* field. Translations for the comment can be configured in *Edit translation*.
- Dynamic keyword list: Enter the address of a trigger that calls a flow with a dynamic keyword list. The address should follow this convention:

```
flows-plugin/trigger/<Trigger ID>
```

For more information on setting up dynamic keyword lists with ELO Flows, refer to the documentation [Processes and automations > ELO Flows > Components > ELO objects and metadata > 'Dynamic keyword list called' trigger configuration](#).

**Please note**

This field is only available for *General text* type fields.

6. Select *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. Select the aspect you want to edit.

The configuration area for the aspect opens.

### Views



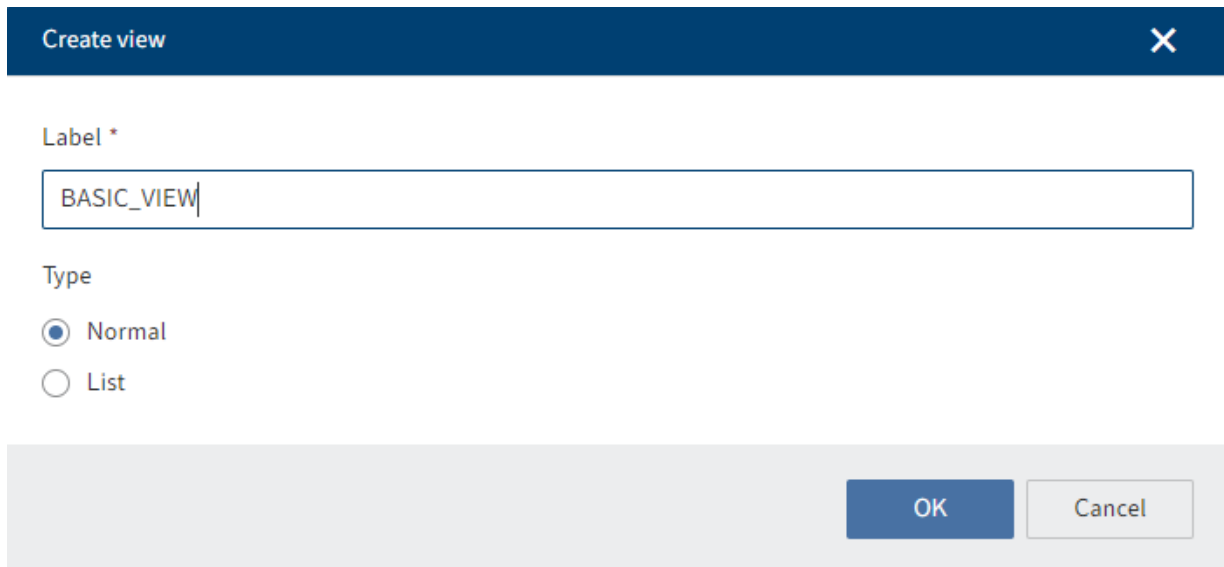
+

Create view

Identifier

No contents available 😊

2. Select *Create view*.



Create view

Label \*

BASIC\_VIEW

Type

Normal

List

OK Cancel

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

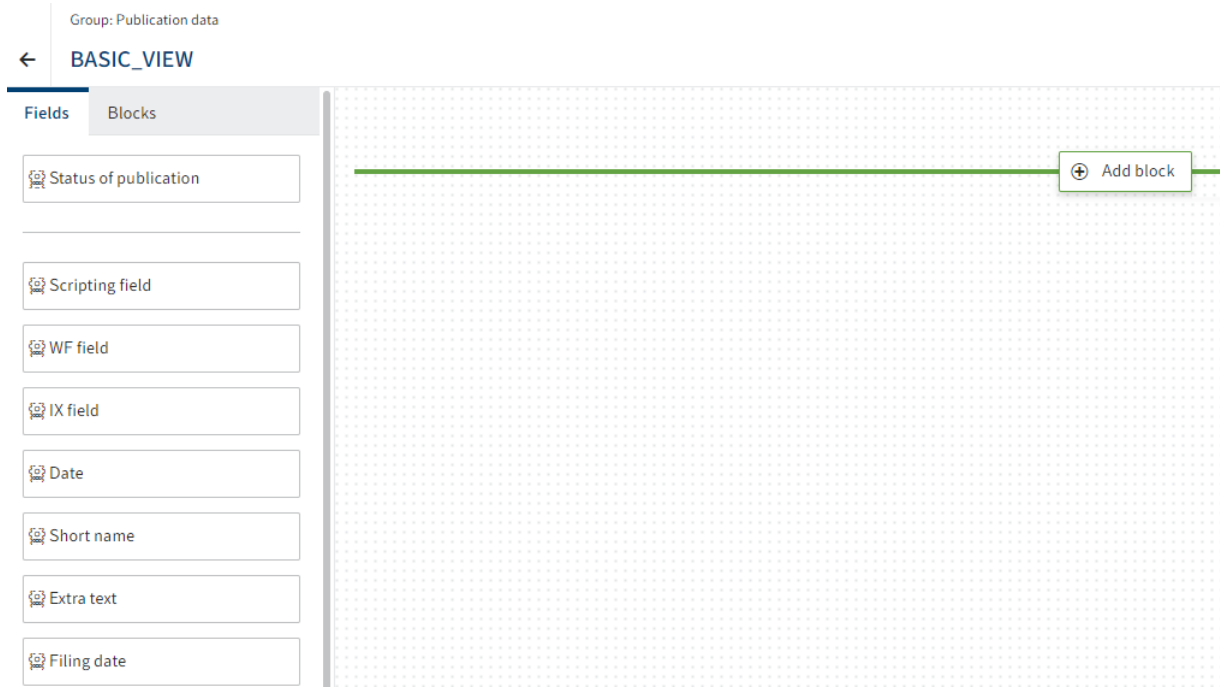
3. Enter a name in the *Label* field.
4. Select a type via the radio buttons.

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 the aspect mapping.

5. Select *OK*.

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

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

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.

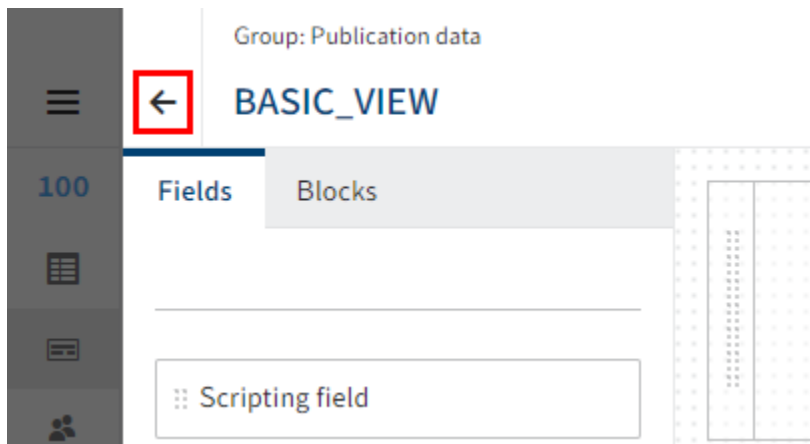


## 8.

Select *Save*.

The view is saved and is now available.

### Close the form designer



1. Close the form designer via the arrow icon.

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

# Metadata forms

## Introduction

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

The following explains 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, select the package you want to edit.

The *Metadata forms* tab is selected automatically.

Namespace: UNI

StudiAdm < Metadata forms

100 Level: Basic

+ Add metadata form

Metadata forms	Identifier	Name	Inherit from
No contents available 😊			

Aspects

Groups

Keyword lists

2. Select *Add metadata form*.

Form

NEW\_DOCMASK

Content Usage Default values

Delete metadata form

Overview

Identifier \* NEW\_DOCMASK

Name EN Edit translation

Inherit from No inheritance Edit inheritance

Aspect mappings

+ Add aspect mapping

Identifier	Name	Occurrence
------------	------	------------

The configuration area for the metadata form 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 *Name* field.

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

5. Select *Save metadata form*.

The framework for the metadata form is created. Refer to the following sections for more configuration options:

- 'Content' tab
- 'Usage' tab
- 'Default values' tab



## 'Content' tab

Metadata forms have to be configured before you can use them. The following settings are configured on the *Content* tab.

### Inheritance

Metadata forms can pass settings on to other metadata forms.

For example, a parent metadata form *Media* can pass settings down to derived metadata forms *DVD* and *Book*. The *Media* metadata form acts as a parent category. The inheriting metadata forms can also have their own aspects and fields in addition to the ones they've inherited.

Configure inheritance for a metadata form as follows:

1. Select *Edit inheritance*.

The *Edit inheritance* area opens.

2. Select one or more metadata forms that the current metadata form should inherit from.
3. Select *Apply*.

The selected metadata forms are entered in the *Inherit from* field.

#### Please note

The aspect mappings of the parent metadata forms are not shown in the inheriting metadata form.

You can perform additional aspect mappings, but this isn't necessary.

4. Select *Save metadata form*.

The metadata form is created with inheritance. The inheriting metadata form automatically uses the views of the parent metadata form if no custom views have been created.

### Assign aspects

#### Aspect mappings

+ Add aspect mapping			🔍
Identifier	Name	Occurrence	
ROOM	Room		

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

1. Select *Add aspect mapping*.

The screenshot shows the 'Aspect mapping' configuration interface. At the top, there is a breadcrumb 'Aspect mapping' and a back arrow. Below that is the title 'NEW\_ASPECTASSOC' with a menu icon. A 'Delete aspect mapping' button is located in the top right corner. The main section is titled 'Overview' and contains several fields:
 

- Aspect \***: A dropdown menu showing 'No aspect selected' with a red border and a warning icon below it stating 'This field cannot be empty.' To its right is a 'Select aspect' button.
- Identifier \***: A text field containing 'NEW\_ASPECTASSOC'.
- Name**: A text field containing 'EN' with an 'Edit translation' button to its right.
- Occurrence**: A checkbox labeled 'May be created multiple times' which is currently unchecked.

The configuration area for aspect mappings opens.

2. Select *Select aspect*.

The selection list for available aspects opens.

3. Select a suggestion.

The identifier and name of the aspect are applied to the aspect mapping.

### Information

You can change the identifier, name, and translations at a later point as needed.

4. Edit the following configuration options as needed.

- **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 the aspect mapping.

- Permissions: If necessary, edit the permissions settings for the aspect mapping.

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

5. Select *Save metadata form*.

The aspect mapping is saved. Add more aspect mappings in the same way as needed.

## 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.

1. Select *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 \*

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:

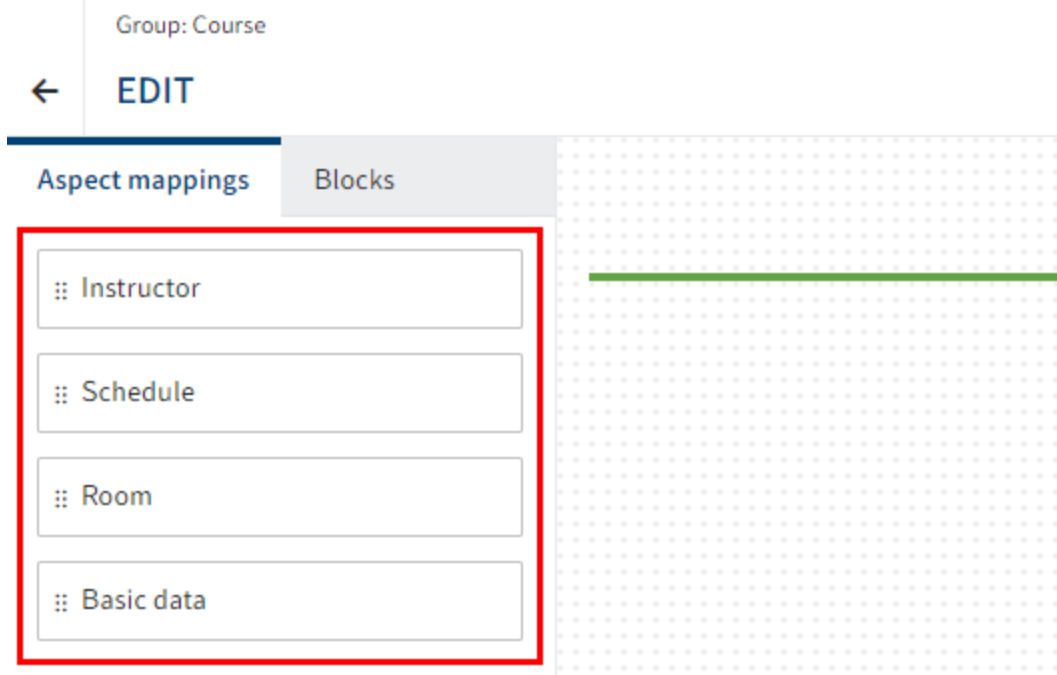
- Default view (EDIT): If no other view is available, ELO attempts to access this view, including for other purposes. This view should therefore always be created.
- View for the viewer pane in the client (VIEW)
- View for creating new entries (CREATE)
- Assign any name: Create a custom type. In this case, you have to enter a name in the *Name* field.

3. Select *OK*.

The screenshot shows the ELO form designer interface. At the top, there's a navigation bar with 'Group: Course' and 'EDIT' view. Below that, there are tabs for 'Designer', 'Logic', 'Preview', and 'Save'. The left sidebar is divided into 'Aspect mappings' and 'Independent block'. Under 'Aspect mappings', there are four items: 'Instructor', 'Schedule', 'Room', and 'Basic data'. Under 'Independent block', there is one item: 'sord.name'. The main canvas is empty with a grid background and a central 'Add block' button.

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

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

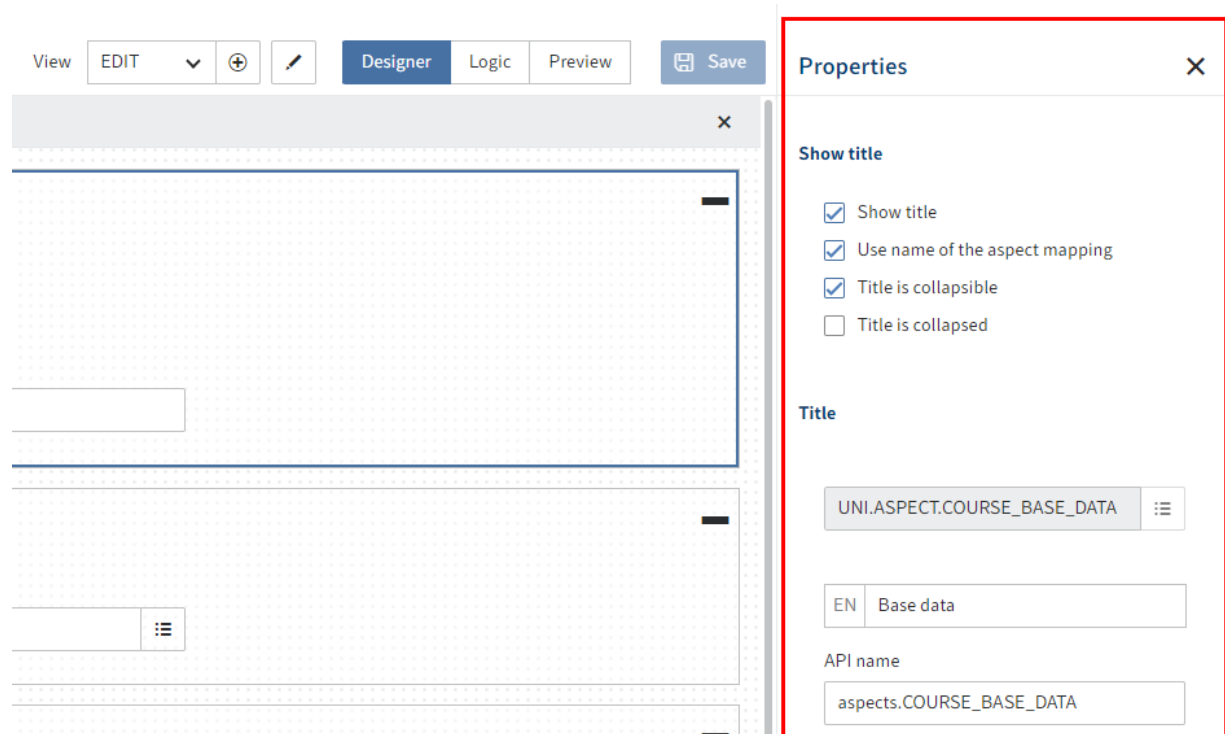


On the *Aspect mappings* tab, you will see the aspect mappings of the metadata form.

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

The aspect mapping is placed in the designer. If available, one of the aspect's views is selected.

The *Properties* tab opens.



- 5.

If required, edit the settings for the aspect mapping on the *Properties* tab.

Choose from the following options:

- Show title: If this option is enabled, the name of the aspect mapping is shown as the title. If available, translations are shown in other languages.
  - Use name of the aspect mapping: If this option is disabled, you can define an alternative title and, if applicable, corresponding translations using the fields in the *Title* area.
  - 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. This option is only available if the *Title is collapsible* option is enabled.
  - Translation variable: If the option *Use name of the aspect mapping* is disabled, you can enter or select an alternative translation variable for the aspect mapping in this field.
  - Name: If the option *Use name of the aspect mapping* is disabled, you can enter an alternative name for the aspect mapping in this field.
  - API name: This is the technical identifier of the aspect mapping.
  - View: Select a different view for the aspect mapping as needed.
6. Repeat these two steps until you have placed all the desired aspect mappings.
  7. Select *Save*.

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

## Create dashboards

Dashboards display statistical analyses of the data filed with the metadata form in workspaces and in the search.

### ▼ Dashboards

+ Add dashboard		🔍
Identifier	Name	
No contents available 😊		

1. Select *Add dashboard*.

Create dashboard
✕

Label \*

Translation variable

☰

Display name

EN

OK

Cancel

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

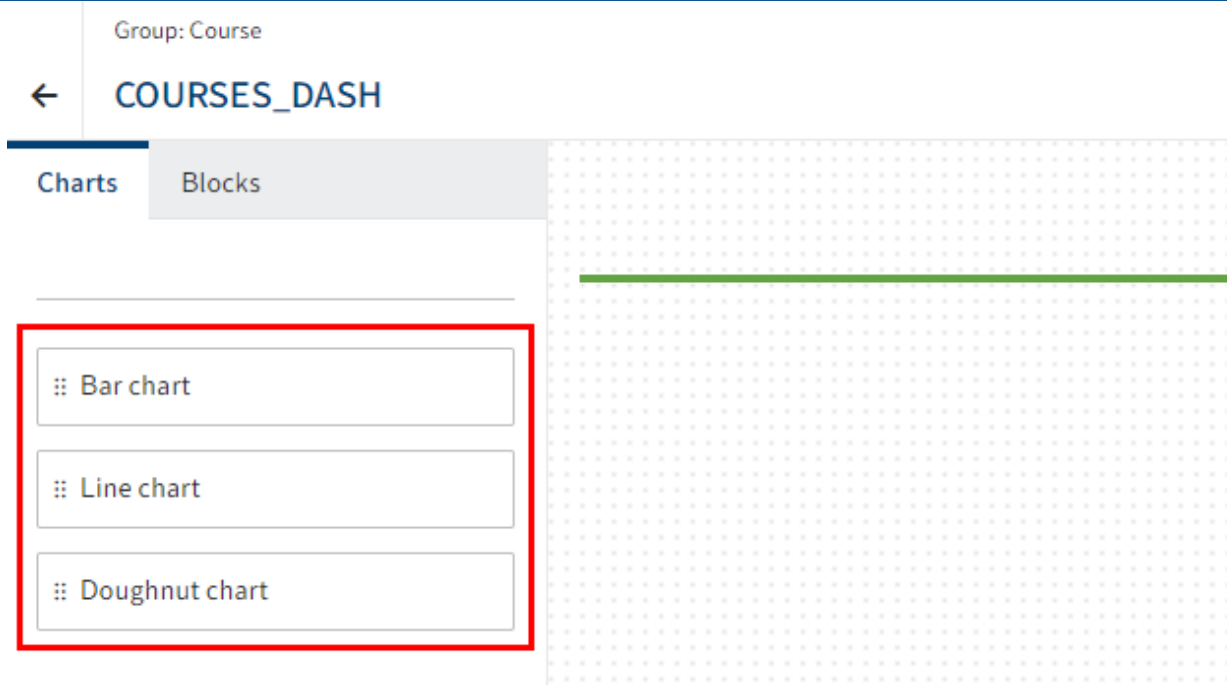
2. Enter a name for the dashboard.
3. Select one of the available translation variables from the drop-down menu. The *Display name* field is completed automatically.

Alternative: Enter a new translation variable into the *Translation variable* field. In *Display name*, enter a name for the dashboard in the respective display language.

4. Select *OK*.

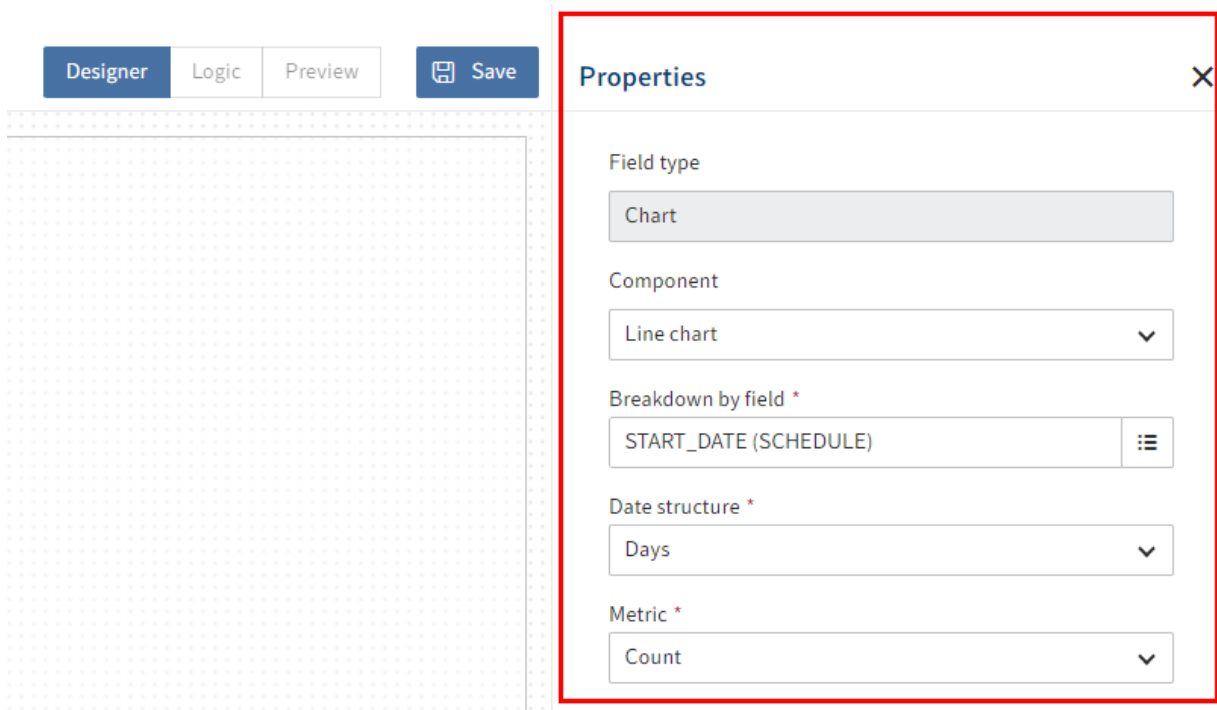
This closes the dialog box. You are now in the form designer (gen. 2).

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



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

- Bar chart
  - Line chart
  - Doughnut chart
5. Drag a chart type to the layout area using drag-and-drop.



6. 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.
- **Title translation key:** The field name is applied by default. If needed, select a different translation variable for the title of the dashboard.
- **Title:** Select a title for the dashboard. Otherwise, the field's technical name is shown.
- **Subheader localization key:** Select a translation variable for the dashboard subheader as needed.
- **Subheader:** Select a subheader for the dashboard as needed. This can help users better understand the purpose of the chart.
- **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.

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

8. Select *Save*.

The dashboard is saved and is now available.

### Information

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

- **Available translation variable:** Select one of the available translation variables from the drop-down menu. The *Name* field is completed automatically.
- **Manual entry:** Enter a new translation variable manually. Enter a name in the *Name* field. The data is saved automatically.

### Configure mapping

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

Designer Logic Preview Save

Properties > Allocate color

Color palette

Gradient: Green-yellow-red

Allocation type

Minimum and maximum value

Maximum point

Maximum value

#e60049

Minimum point

Minimum value

#50e991


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.


## 'Usage' tab

The following settings are configured on the *Usage* tab.

Form

 COURSE


Content Usage Default values 

 Delete metadata form

Usage

Documents

Folders

Business object 

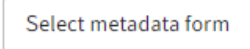
Simple folder



Relation

Restriction

Usage determined by parent element

Restrict selection of metadata forms for child entries

*No metadata form selected* 

Inheritance for search  Inherit fields to child entries 

## Usage

In the *Usage* area, you define what the metadata form can be used for.

**Documents:** The metadata form can be used for all elements with a document character. In ELO, documents can be compared to files in the file system.

**Folders:** Folders are split into the following types:

- **Business object:** Used to collect child entries with metadata that is in some cases inherited. A business object creates a region. Child entries are connected through this region. They inherit the GUID of the business object as their region ID.
- **Simple folder:** Folders without additional inheritance logic for metadata. These can be created anywhere in the repository.

**Relation:** The metadata form can be used to establish a *Relation* type link. 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 fields of the associated metadata form as a keyword list. You can recognize relation fields by the chain icon.

## Restriction

You can make the following settings in the *Restriction* area:

Usage determined by parent element: If the option 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.

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

## Inheritance for search

You can make the following settings in the *Inheritance for search* area.

Inherit fields to child entries: Opens the *Inherit fields to child entries* dialog box. This is where you define which aspect mappings can inherit fields to child entries when using ELO iSearch.

### Please note

Field contents are not inherited. The inheritance function only affects the search.

DOCU.CONTRACT

### Inherit fields to child entries



We recommend not inheriting more than 10 fields to child entries, as this can have a negative impact on search performance.

Inherited fields (0): No fields inherited 😊

Selected fields (1): Contract number (basic contract data)

Basic contract data

Identifier	Name	Field type
NR_CONTRACT	Contract number	Text in general

Save

Cancel

Example: You have a business object *contract 12346789* with the field *Contract number*. The child entries do not have this field. If you want to find the child entries when searching for the contract number, you need to allow *inheritance to child entries*.

### Please note

For the inheritance function to work, the following requirements must be met:

- The parent metadata form must be enabled for use with business objects (*Metadata forms > Usage > Business object*).
- Inheritance for the fields of the aspect must be enabled (*Allow inheritance to child entries* option).
- The aspect mappings being passed on must be enabled in the parent metadata form. (*Usage tab > Inherit fields to child entries*)
- The *May be created multiple times* option must NOT be enabled.

## Permissions

In the *Permissions* area, you define who can use the metadata form in which form. The *Everyone* group is configured with the *View (R)* and *Change (W)* permissions by default.

## Workflows

In the *Workflows* area, you can select workflow templates with which workflows will be started when using the metadata form.


Default workflow: Starts a workflow with the selected workflow template the first time an entry is filed with the metadata form.

Check-in workflow: Starts a workflow with the selected workflow template when checking an entry in with the metadata form.


## 'Default values' tab

The following settings are configured on the *Default values* tab.

Form

 COURSE

Content Usage **Default values** X

 Delete metadata form

▼ **Entry option defaults**

Entry type

Font color

Document status/sorting  ▼

Document path

Deletion period  ⓘ

Retention period  ⓘ

### Entry option defaults

In the *Entry option defaults* area, you can configure the following preset values for entries:

**Entry type:** Define the entry type assigned to entries with this metadata form. If no entry type is set, ELO uses the default value.

If an icon is configured for the entry type in the package, this icon is shown in workspace filter trees.

You will find more information under [Entry types](#).

**Font color:** Define the font color assigned to entries with this metadata form. ELO uses the color *System color* by default.

You will find more information under [Other topics > Font colors](#).

**Document status/sorting:** For documents, this setting defines the document status. For folders, this setting defines the default sort order.

- The following document statuses are available:
  - **Version control disabled:** Only one version of the document is stored. Creating a new version overwrites the previous version.
  -

Version control enabled: If the document is edited, a new version is created. All changes are documented. Older versions can be restored.

- Non-modifiable: ELO does not allow changes to the document and its metadata.
- The following sorting options are available:
  - Sort manually: You can move the entries within the folder manually. To do so, the folder must be opened in the list view.
  - Alphabetical: Entries are sorted ascending from A to Z.
  - Document date: The entry with the most recent document date is at the bottom.
  - Filing date: The entry with the most recent filing date is at the bottom.
  - Document date, descending: The entry with the most recent document date is at the top.
  - Filing date, descending: The entry with the most recent filing date is at the top.
  - Alphabetical, descending: Entries are sorted in descending order from Z to A.

Document path: Defines the path where the entries with default settings are filed to. To be able to select another path, it has to be configured first.

You will find more information under [ELO server > Repository and documents > Document paths](#)

Deletion period: Enter an interval for the maximum date when an entry with this metadata form must be deleted.

Retention period: Enter how long an entry with this metadata form has to be retained. The entry cannot be deleted before the configured period is up.

### Information

Syntax for the *Deletion period* and *Retention period* fields:

+<code>+<number>

Example: +24M

The following codes are possible:

- D or T: Days
- W: Weeks
- M: Months
- Y or J: 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 will find more information under [Configuration and administration > System administration > Encryption keys](#).

**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

In the *Entry permissions* area, you can configure which permission settings are set by default for entries with this metadata form.

### ▼ Entry permissions ⓘ

AND group		Owner	Parent rights
<input type="text" value="Add user or group"/>			
<input type="checkbox"/>	User/group	Rights	
<input type="checkbox"/>	Parent rights	-----	✕

- View (R)
- Change (W)
- Delete (D)
- Move (E)
- Edit list (L)
- Set permissions (P)

The *Parent rights* setting is set by default, meaning parent elements pass down the permission settings.



# Forms

## Introduction

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

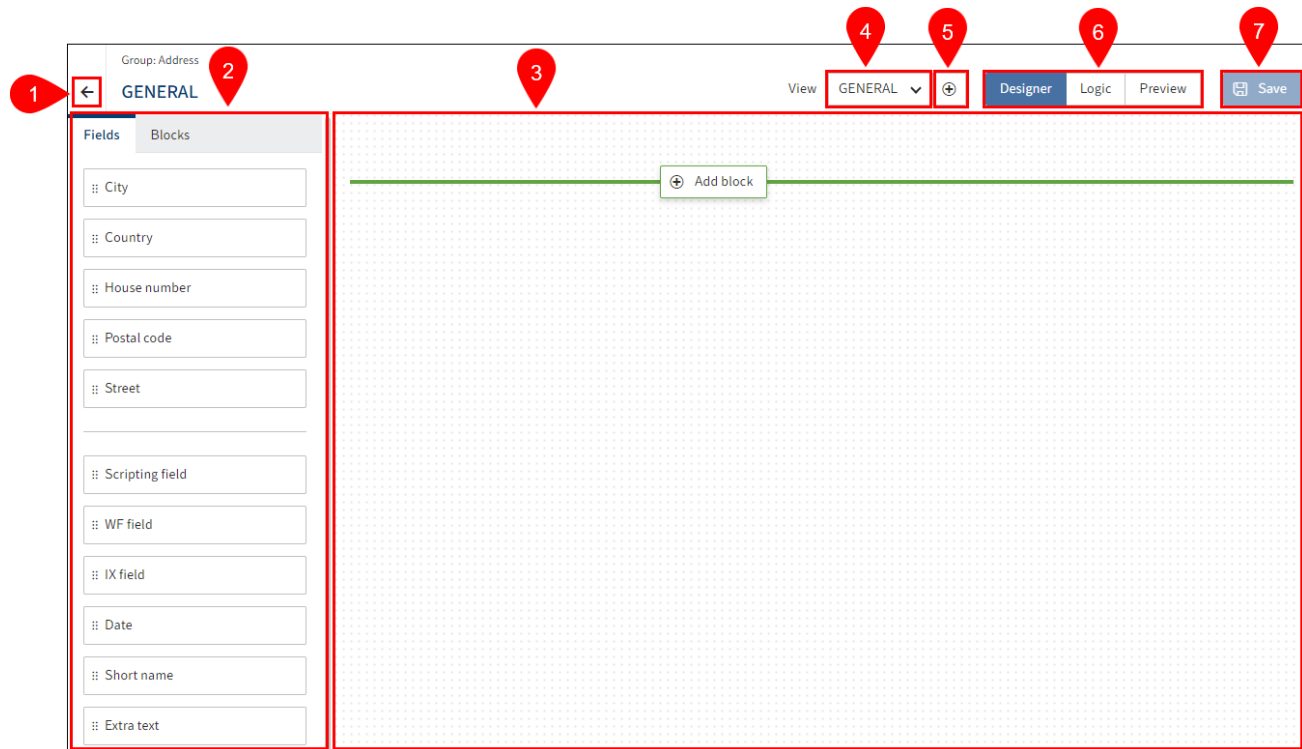
They are configured in the form designer (gen. 2) and are characterized by the following properties, among others:

- 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 following actions are available in the form designer (gen. 2):

- 1 Close form designer
- 2 Add elements
- 3 Edit form
- 4 Select form
- 5 Add form
- 6 Select mode
- 7 Save form

### Select mode

The following modes are available:

- Designer: To design the form
- Logic (preview feature): For scripting and translations
- Preview: To test the form functions and rendering with different screen sizes

## Edit form

### Add elements

#### Place 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.

Optional: You can move elements in the same way.

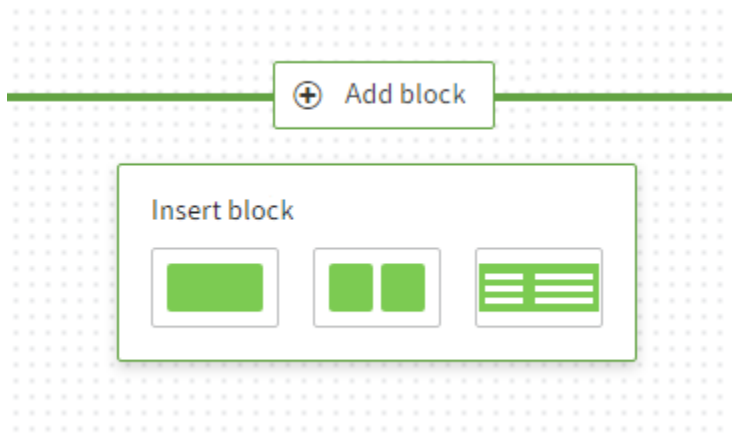
#### Add block

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

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

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

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



A drop-down menu appears.

2. Select one of the options.

The block is added.

#### Create tabs

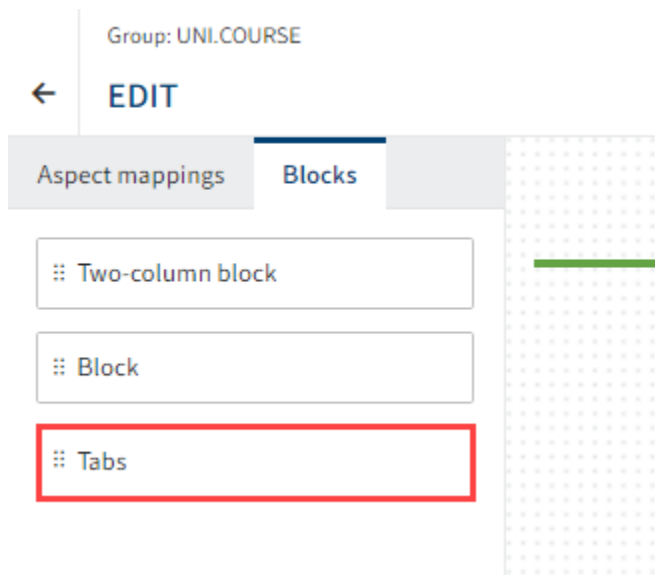
A form can be divided into tabs for a clearer structure. Follow the steps below.

**Information**

This function is currently only available for metadata form views.

**Create tab**

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



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

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

The tab is shown.

Option 1: Under *Properties > Translation variable*, change the translation variable for the tab.

Option 2: Change the display name of the tab under *Properties > Tab name*.

Option 3: Enter something under *Properties > API name*.

4. Select *Save*.

The first tab is created.

**Add tab**

You can add tabs with the plus icon.

### Position element on tab

You can position elements and move them on a tab via drag-and-drop.

You can also drag elements to other tabs and drop them there.

### Remove elements from the layout area

Depending on the context, you will find fields, aspect mappings, or layout elements in the layout area. These elements 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.



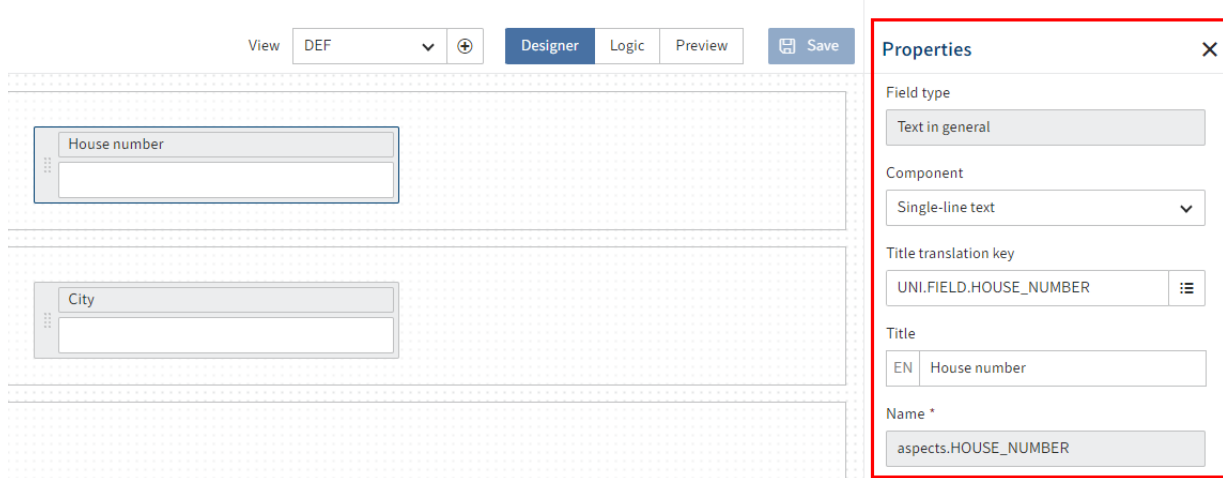
An X icon appears on the field.

2. Remove the element using the X icon.

The field is removed from the layout area.

## Field properties

1. To edit the properties of a field, select 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. Select *Save*.

## General field properties

The configuration panel on the right includes the following settings:

- Field type:** Text in general
- Component:** Single-line text
- Title translation key:** UNI.FIELD.HOUSE\_NUMBER
- Title:** EN | House number
- Name \*:** aspects.HOUSE\_NUMBER
- Placeholder translation key:** (empty)
- Placeholder:** EN | (empty)

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 in the current display language depending on the *Title translation key* field.
- **Name:** Shows the technical name of the field.
- **Placeholder translation key:** Shows the translation variable entered for the *Placeholder* field (see below). Can be changed.
- **Placeholder:** Here, you can enter example values that help users complete the form. The value is linked to the respective translation variable. The value is shown in the current display language.
- **Field size:** This option lets you set the display size of the field.
- **Mandatory field:** If the *Mandatory field* option is enabled, the form cannot be closed until the field has been completed.
- **Disabled:** If the *Disabled* option is enabled, the field is set to *Read-only*.

Below, you will find an overview of properties that are also available depending on the selected data type.

### Information

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

## Text fields

The screenshot shows a vertical sidebar on the left with a close button (x) and a dotted grid background. The main area contains the following configuration options for a Text field:

- Min. characters:** An empty text input field.
- Max. characters:** A text input field containing the value "255".
- Regular expression:** An empty text input field.
- Error message for regular expression translation key:** A text input field with a menu icon (three horizontal lines) on the right.
- Error message for regular expression:** A text input field with a dropdown menu icon on the left, currently showing the value "EN".

Multiple field types or components use the *Text* data type:

- General text (*Single-line text* component)
- Long text (*Multi-line text* component)
- E-mail address
- URL

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

- **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: If you want to work with translations, enter a translation variable for the error message.

- Error message for regular expression: 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.

## Number fields

Min. value

Max. value

Multiple field types are used to display numbers:

- Integer
- Floating-point number
- Large decimal number

The following properties are available for number 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.

## Numbers with decimal places

The following properties are available for the *Floating-point number* and *Large decimal number* data type fields:

- Number of decimal places: Defines how many decimal places can be entered.

## Floating-point number

Min. value

Max. value

Show thousands  
separators

Number of decimal places

The following property is also available for *Floating-point number* type fields:

- Show thousands separators: If this option is enabled, separators are shown for thousands.

The field applies the client display settings as far as possible.

## Date and time fields

Min. date

Max. date

Multiple field types are used to select times or time periods:

- Date
- Date and time
- Time

These fields are additional properties for narrowing down the time period that can be selected. For *Date\_Only* e.g.:

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

## Selection list

Name of keyword list

UNI.COUNTRY

The following properties are available for *Selection list* type fields:

- Name of keyword list: This field is ready-only. It shows the name of the selected keyword list.

## Toggles

Component

Toggles

*Selection list* type fields can alternatively use the *Toggle buttons* component. In this case, the following properties are available:

Status

- Candidates
- Immatriculated
- Exmatriculated
- Alumni
- Paused

Status

Candidates
Immatriculated
Exmatriculated
Alumni
Paused

- Display as buttons: Changes the list view to buttons. By default, the values in the list are displayed as radio buttons.
- Arrange horizontally: Arranges the buttons/radio buttons next to one other. With the default settings, they are arranged one below the other.

## User fields

### Restrict selection

- Both
- Groups
- User

### User belonging to a group



### Registered function

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

- **Restrict selection:** Restricts the selection of the field content. You can choose between *Both*, *Groups*, or *User*.
- **User belonging to a group:** If you select *Both* for *Restrict selection*, you can narrow the available options down to a specific group.
- **Registered function:** You have the option to use a registered function that returns a list of users. A JSON object with the `users` array property is expected. The array contains the names or GUIDs of the respective users. The array is processed with `CheckoutUsersC.BY_IDS`.

For more information on registered functions, refer to [Programming for ELO > ELO Indexserver programming guide > Adding functionality with registered functions](#), for example.

## Additional fields

In addition to the fields created in the aspects, you can create additional fields in the form designer.

### Additional metadata

ELO automatically creates the following fields as object metadata.

Field	Description	Note
Short name	Internal name in ELO	Mandatory field; automatically populated with GUID if left blank
Date	Date last edited	
Filing date	Date last filed to ELO	Standard: Read-only
Editor	User who last edited the object	Standard: Read-only
Current version	Last entered version number	Standard: Read-only
Extra text	Unconditional field for different purposes in ELO	
Metadata form	Shows the metadata form assigned to the object.	Standard: Read-only
Reference number	Internal business object ID	Standard: Read-only
External ID	Field for IDs from third-party systems	Standard: Read-only; must be unique



### Technical fields

The following fields are intended for scripting and workflows:


Field	Description	Note
Scripting field	Defines a scripting field with assignable names	Can be inserted multiple times
WF field	Defines a WF MAP field with assignable names	Can be inserted multiple times
IX field	Defines an IX MAP field with assignable names	Can be inserted multiple times

### Info text

The *Info text* field type can be placed multiple times in the form as a free text field. The field size of these fields is automatically *large*. Different colors and symbols are displayed depending on the info type.

 Information Warning

Danger

 Success

The following info types are available:

- Information
- Warning
- Danger
- Success

The *API name* field can be used to assign a technical identifier that can be addressed using scripting.

# Keyword lists

## Overview

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

The screenshot displays the 'Keyword lists' management interface. On the left, a table lists various keyword lists. On the right, a detailed view for the 'STUDENT\_STATUS' list is shown, including fields for Identifier, Name, and Keywords.

Identifier	Name
BUILDING	Building
COUNTRY	Country
E_MAIL_TYPE	Type of e-mail address
FEE_STATUS	Fee status
FEE_TYPE	Type
GENDER	Gender
NATIONALITY	Nationality
PHONE_TYPE	Type of phone number
ROOM_STATUS	Booking status
ROOMS	Rooms
STUDENT_STATUS	Status

Identifier *	Name
STUDENT_STATUS	

Name: EN Status Edit translation

Keywords \*

Identifier	Name
APPLICANT	Candidates
ENROLLED	Immatriculated
EXMATRICULATED	Exmatriculated
ALUMNI	Alumni
PAUSE	Paused

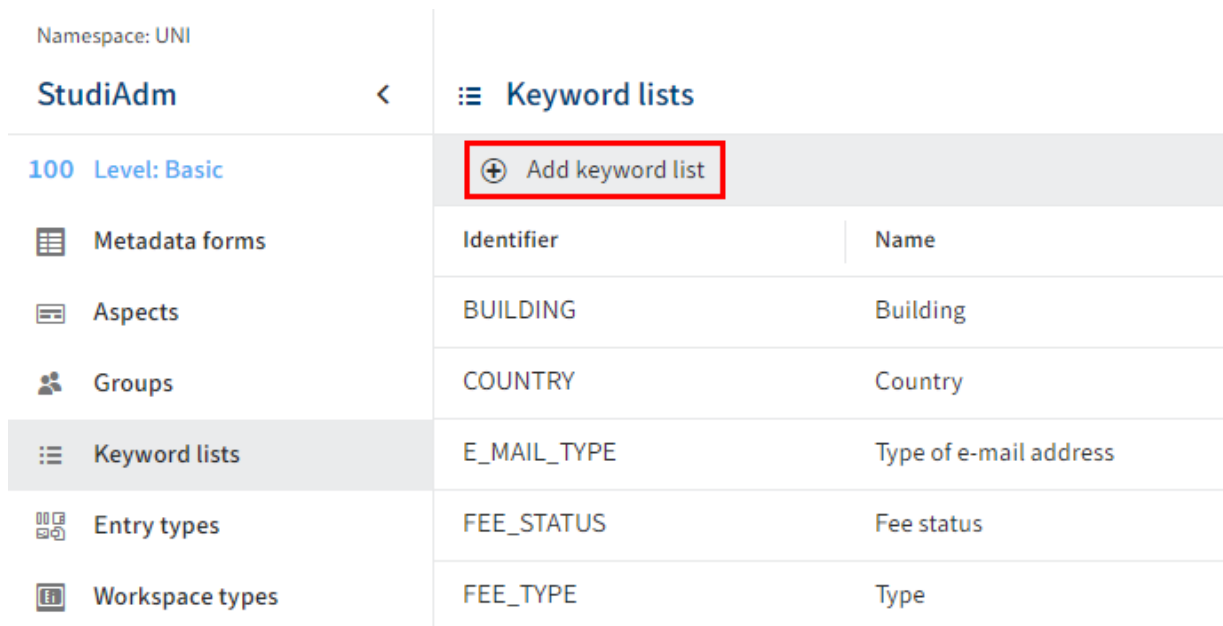
The following actions are available in the *Keyword lists* menu item:

- 1 Add keyword list
- 2 Search keyword lists
- 3 Import keyword lists
- 4 Delete keyword list
- 5 Edit keyword list

## Add keyword list

To add a keyword list, follow the steps below.

1. Open the *Keyword lists* area.



Namespace: UNI

StudiaAdmin < ≡ Keyword lists

100 Level: Basic

⊕ Add keyword list

Identifier	Name
BUILDING	Building
COUNTRY	Country
E_MAIL_TYPE	Type of e-mail address
FEE_STATUS	Fee status
FEE_TYPE	Type

2. Select *Add keyword list*.

The configuration area for the keyword list 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 *Name* field.

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

5. Add at least one keyword. You will find more information in the following section *Edit keyword list > Add keyword*.

Alternative: Select *Import keyword list* to import a keyword list as a TXT file. You will find more information in the following section *Import keyword list*.

6. Select *Save keyword list*.



The keyword list is created.

## Import keyword list

Keyword lists can be imported as TXT files.

### Please note

Import is only possible if no keywords have been created yet.

The syntax for the TXT file must be as follows:

```
<NAME1>    <TRANSLATION_VARIABLE1>
<NAME2>    <TRANSLATION_VARIABLE2>
...
```

A TABULATOR is used as the separator between the name and translation variable. A line break represents a new keyword.

Example:

```
APPLICANT   UNI.STUDENT_STATUS.APPLICANT
ENROLLED    UNI.STUDENT_STATUS.ENROLLED
EXMATRICULATED  UNI.STUDENT_STATUS.EXMATRICULATED
ALUMNI      UNI.STUDENT_STATUS.ALUMNI
PAUSE       UNI.STUDENT_STATUS.PAUSE
```

### Information

Translations cannot be imported via the TXT file.

To provide translations, use the *Edit translation* function and/or the Translations area.

## 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*, select the keyword list you want to add an entry to.

The screenshot shows the 'Keyword list' dialog box for the 'STUDENT\_STATUS' list. At the top, there is a back arrow, a hamburger menu icon, and the text 'STUDENT\_STATUS'. Below this is a toolbar with 'Import keyword list' and 'Delete keyword list' buttons. The main area contains an 'Identifier \*' field with 'STUDENT\_STATUS' entered. Below that is a 'Name' field with 'EN' and 'Status' in separate boxes, and an 'Edit translation' button. A section titled 'Keywords \*' is expanded, showing a table with columns 'Identifier' and 'Name'. A red box highlights the 'Add keyword' button (plus icon) in the table's header row.

The *Keyword list* dialog box opens.

2. Select *Add keyword* (plus icon).

The configuration area for the keyword 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 *Name* field.

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

Optional 2: Repeat steps 2-5 for additional keywords.

5. Select *Save keyword list*.

The keyword is added to the list.

## Change the order of keywords

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

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

### Keywords \*

+ Add keyword		🔍
Identifier	Name	
⋮ APPLICANT	Candidates	
⋮ ENROLLED	Immatriculated	
⋮ EXMATRICULATED	Exmatriculated	
⋮ ALUMNI	Alumni	
⋮ PAUSE	Paused	

The configuration area for the keyword list opens. Under *Keywords*, you can see all the keywords you have already created.

2. Select the keyword you want to move and keep the mouse button pressed.
3. Move the keyword to the desired position.
4. Release the mouse button.

The keyword is inserted at the new position.

5. Select *Save keyword list*.

# Entry types

## Overview

You can create and manage custom entry types for packages via the *Entry types* menu item.

Entry types can be linked to metadata forms. The icon associated with an entry type makes it easier to recognize different types of entries.

The screenshot shows the 'Entry types' management interface. On the left, there is a table of existing entry types:

Icon	Identifier	Name	Type	File extensions
	COURSE	Course	Folder	
	FACULTY	Faculty	Folder	
	STUDENT	Student	Folder	
	SUBJECT	Subject	Folder	
	UNI_FILE	UNI file	Document	uni

On the right, the configuration form for the 'COURSE' entry type is shown. It includes the following fields and options:

- Identifier \***: COURSE
- Name**: EN | Course (with an 'Edit translation' button)
- Type**: Document (radio button), Folder (radio button, selected)
- Icon \***: (with a 'Select icon' button and a drag-and-drop area)
- ID**: 1048
- GUID**: (EFC87635-B0AE-3D08-F1DA-BBB13AE70881)

The following actions are available in the *Entry types* menu item:

- 1 Add entry type
- 2 Search entry type
- 3 Filter entry types
- 4 Delete entry types
- 5 Configure entry types

## Add entry type

To add an entry type, follow the steps below.

1. Select *Add entry type*.
2. 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.

3. Enter a display name in the *Name* field.

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

4. Under *Type*, select the purpose (document or folder) of the entry type.

Optional: For the *Document* type, enter one or more extensions linked to the entry type. If a document with an appropriate extension is filed, the respective entry type is then assigned automatically.

5. Upload an icon for the entry type.

- Permitted file format: SVG

6. Select *Save entry type*.

The entry type is created and can now be linked to metadata forms.