



ELO packages

Metadata



Table of contents

Aspects	3
Introduction	3
Create aspect	4
Add fields	6
Create view for aspect	11
Metadata forms	16
Introduction	16
Create metadata form	17
'Content' tab	19
'Usage' tab	30
'Default values' tab	33
Forms	36
Introduction	36
Form designer (gen. 2)	37
Edit form	38
Field properties	44
Additional fields	52
Logic	54
Keyword lists	56
Overview	56
Add keyword list	57
Edit keyword list	59
Entry types	62
Overview	62

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.

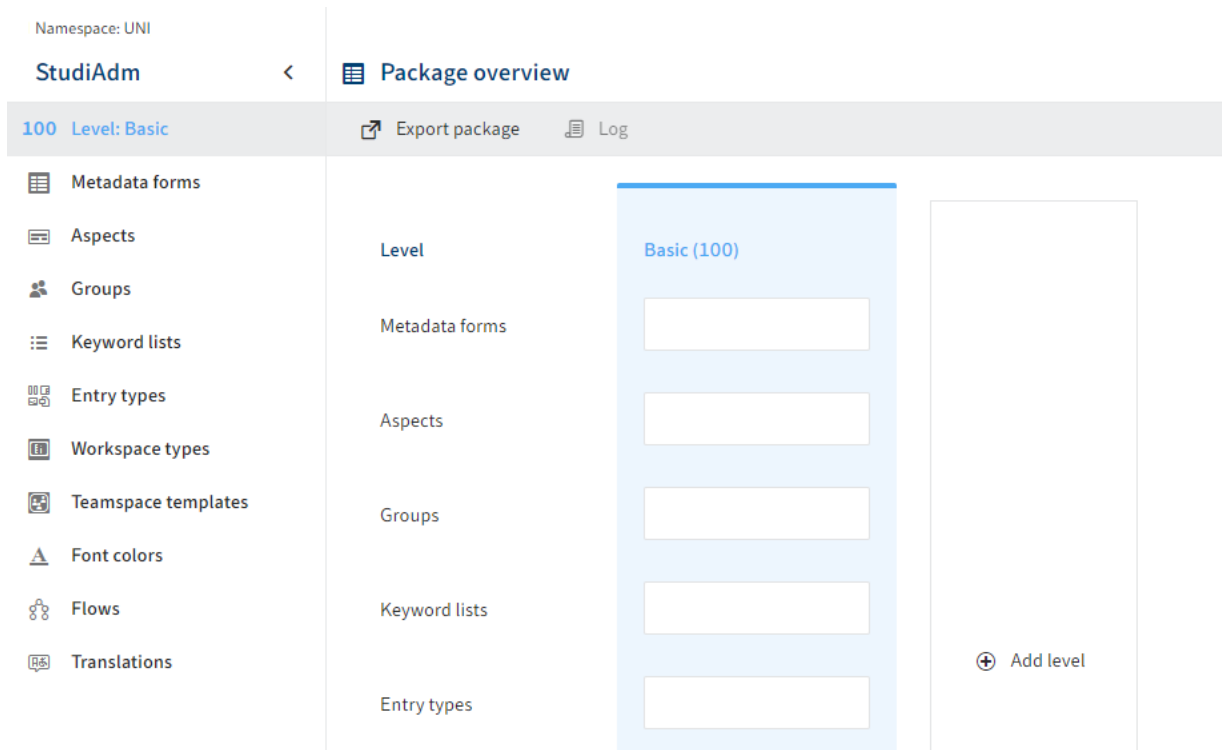
Information

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



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



The package opens.

2. Select *Aspects*.



The *Aspects* tab opens.

3. Select *Add aspect*.

The screenshot shows a web interface for creating a new aspect. At the top, there's a header bar with the title 'NEW_ASPECT_1' and a close button (X). Below the header, there's a 'Delete aspect' button with a trash icon. The main content area is titled 'Overview' and contains two input fields. The first field is labeled 'Identifier *' and has the text 'NEW_ASPECT_1' entered. The second field is labeled 'Name' and has a dropdown menu showing 'EN' and an 'Edit translation' button next to it.

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

<div> Add field</div> <div></div>		
Identifier	Name	Field type
No contents available 😊		

2. Select *Add field*.

The screenshot shows the 'NEW_FIELD' configuration interface. The sidebar on the left contains icons for various field types, with the 'Field' icon selected. The main configuration area has the following fields:

- Identifier ***: A text input field containing 'NEW_FIELD'.
- Name**: A text input field containing 'EN' and a button labeled 'Edit translation'.
- Field type**: A dropdown menu showing 'Text in general'.
- Data type**: A text input field containing 'Text'.
- Default value**: A text input field.
- Exclude from iSearch**: A checkbox.

At the bottom, a message states 'The aspect has been changed.' with two buttons: 'Save aspect' and 'Cancel'.

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.
- Provide for search in child entries: Use this option to specify whether to also find child entries for these fields when using ELO iSearch.

Example: You have a business object *contract 12346789* with the field *Contract number* and other fields. The child entries do not have these fields. If you want to find the child entries when searching for the contract number, for example, enable the option to provide metadata in child entries.

Please note

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

- The relevant metadata form must be enabled for use with business objects (*Metadata forms > Usage > Business object*).

Refer to the section 'Usage' tab > Usage for more information

- The *Provide for search in child entries* option must be enabled for the fields of the respective aspect (see above).

- The aspect mappings being provided must be enabled in the relevant metadata form. (*Usage tab > Provide metadata in child entries*).

Refer to the section 'Usage' tab > Search

- The *May be created multiple times* option MUST BE DISABLED.

Refer to the 'Contents' tab > Assign aspects section for more information.

- 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.

General approach

1. Select the aspect you want to edit.

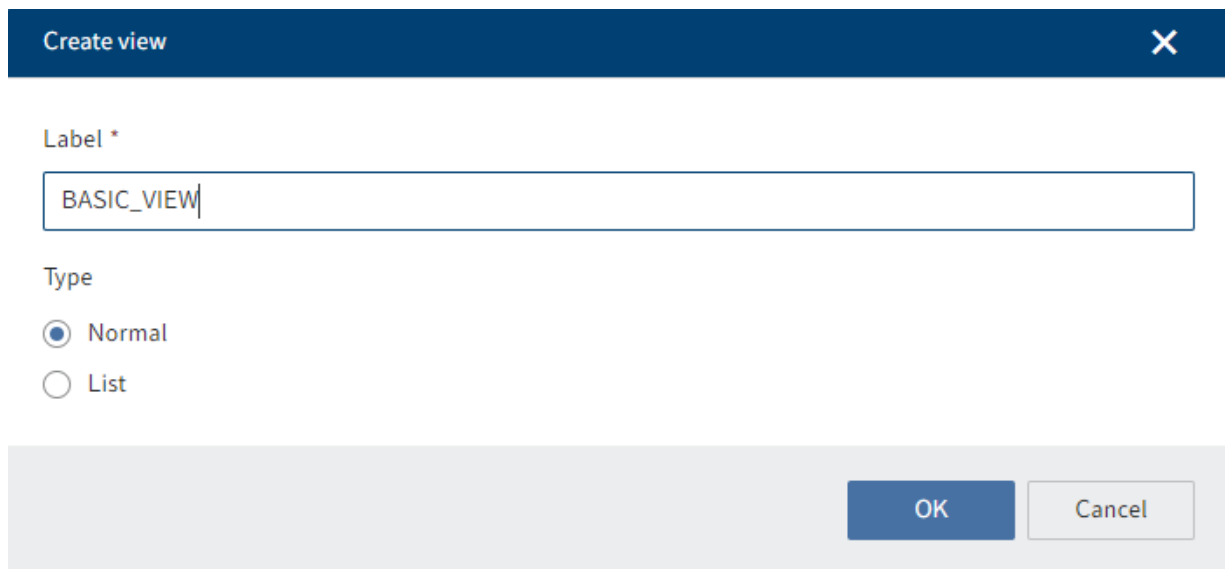
The configuration area for the aspect opens.

▼ Views



Identifier
No contents available ☹️

2. Select *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.

The following types are available:

-

- 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.

List type views require a *Normal* type view. Create this view first before creating a *List* type view.

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)

6. Edit the settings for the selected type.

Each type has different settings. Refer to the following sections for more information.

- 'Normal' type
- 'List' type



7. Select *Save*.

The view is saved and is now available.

'Normal' type

Note the following steps and information for the *Normal* type.

Group: Basic device data

← BASIC_VIEW

Fields

Blocks

⋮ Date of purchase

⋮ Manufacturer

⋮ Serial number

⋮ Scripting field

⋮ WF field

⋮ IX field

⋮ Date

⋮ Short name

⊕ Add block

1. Drag a field to the layout area using drag-and-drop.
2. 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.

For more information on the field properties, refer to Forms > Field properties.

'List' type

Note the following steps and information for the *List* type.

Please note

List type views require a *Normal* type view. Create this view first before creating a *List* type view.

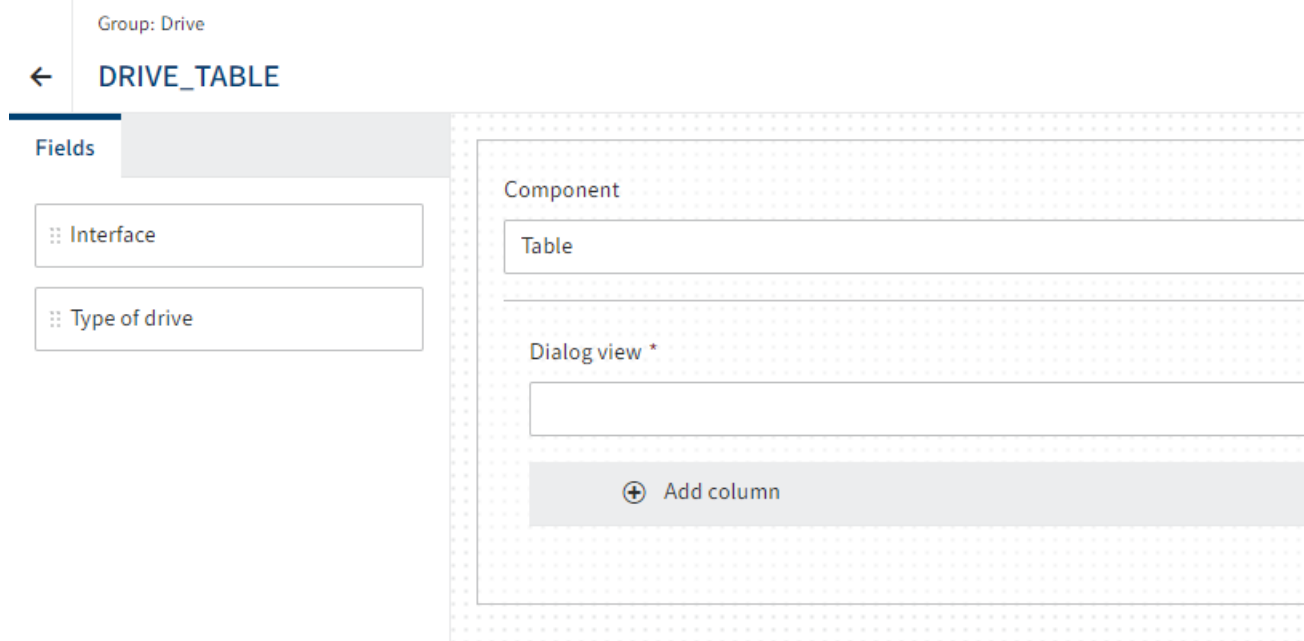
The *List* type is broken down into sub-types based on the following components:

- Table
- List

The following sections discuss the particularities of the components.

'Table' component

For views with the *Table* component, the selected fields are shown as columns in a table. One line is added per aspect entry.



The *Table* component is selected by default.

1. Via the *Dialog view* drop-down menu, select a *Normal* type view that will be shown in the dialog box when editing the table.
2. Select *Add column*.

A column is added to the table. The *Properties* area opens.

Optional 1: With the *Fixed width (in px)* property, you can assign the column a fixed size as needed.

3. Drag a field to the column using drag-and-drop.

Optional 2: Repeat the steps above for additional fields as needed.

Optional 3: 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.

For more information on the field properties, refer to Forms > Field properties.

4. Select *Save*.

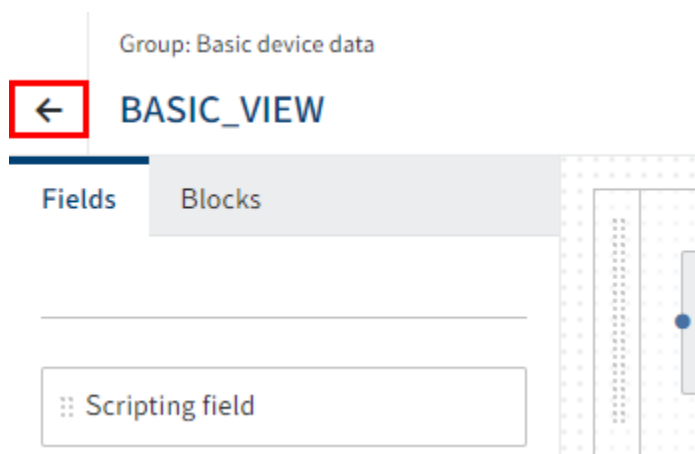
The view is saved and is now available.

'List' component

For views with the *List* component, the fields are shown as is configured in the selected *Normal* type view. Buttons for adding to and editing the list appear when completing the aspect. The aspect can therefore be used for multiple entries.

1. In the *Component* drop-down menu, select the entry *List*.
2. In the *View* drop-down menu, select a *Normal* type view.
3. 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.

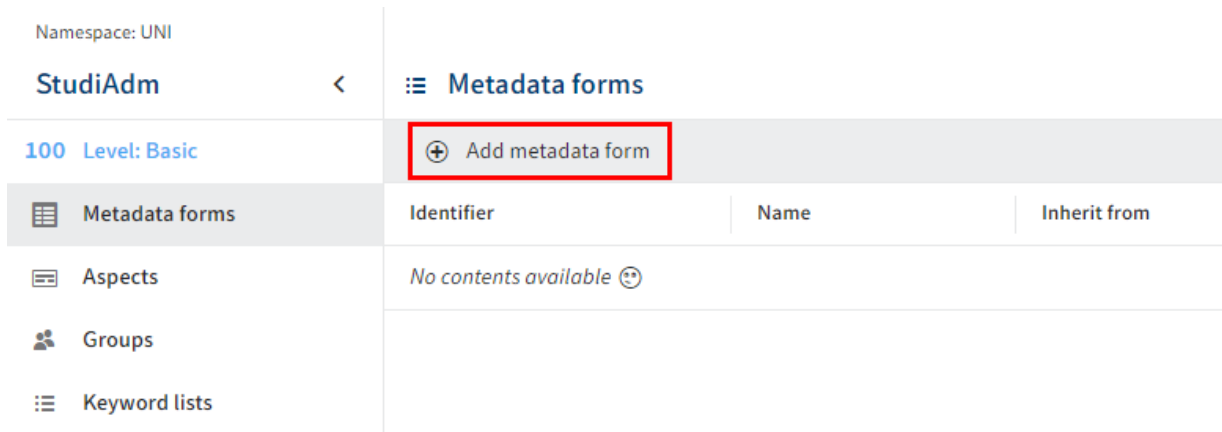
A separate search index is built for each metadata form. A large number of metadata forms therefore requires a large amount of RAM and hard disk space for the ELO iSearch.

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

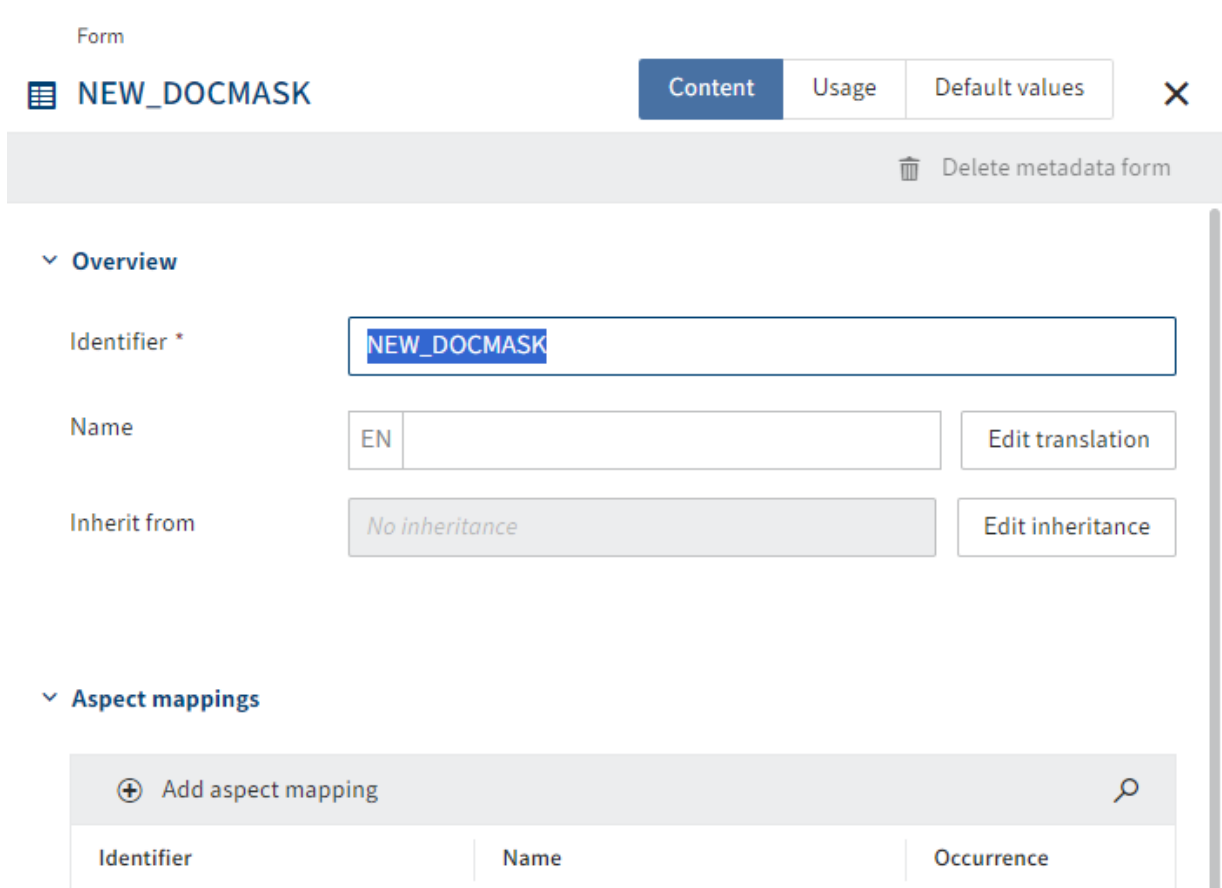
StudiAdm < Metadata forms

100 Level: Basic

+ Add metadata form

Metadata forms	Identifier	Name	Inherit from
Aspects	No contents available 😊		
Groups			
Keyword lists			

2. Select *Add metadata form*.



Form

NEW_DOCMASK

Content Usage Default values X

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.

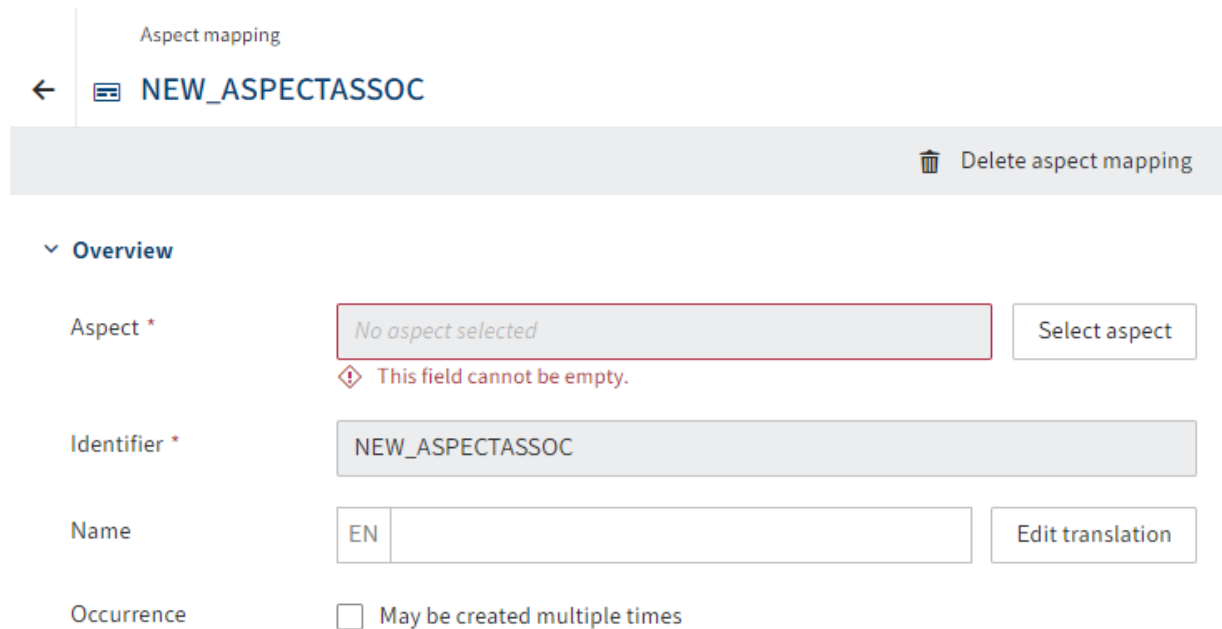
Assign aspects

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*.



Aspect mapping

← NEW_ASPECTASSOC

Delete aspect mapping

▼ Overview

Aspect * No aspect selected Select aspect
 ⓘ This field cannot be empty.

Identifier * NEW_ASPECTASSOC

Name EN Edit translation

Occurrence ☐ May be created multiple times

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.

Please note

If the *May be created multiple times* option is enabled and the metadata form is saved, this setting can no longer be undone.

Aspects with the *May be created multiple times* option enabled cannot provide metadata in child entries.

Example: Using an aspect multiple times makes 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.

warning 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

The screenshot shows the 'DEVICE' metadata form interface. At the top, there are tabs for 'Content', 'Usage', and 'Default values'. Below the tabs, there is a 'Delete metadata form' button. The main content area has a sidebar with 'Overview' and 'Aspect mappings' sections. The 'Views' section is expanded, showing a 'Create view' button (highlighted with a red box) and a search icon. Below the button, there is a table with the header 'Identifier' and a message '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 *

OK

Cancel

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

2. Select a type via the radio buttons.

Choose from the following options:

- Default view (EDIT): 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*.

Group: Course

← EDIT

View EDIT ▾ ⊕ ✎

Designer Logic Preview

Save

Aspect mappings

Blocks

⌵ Instructor

⌵ Schedule

⌵ Room

⌵ Basic data

Independent block ⓘ

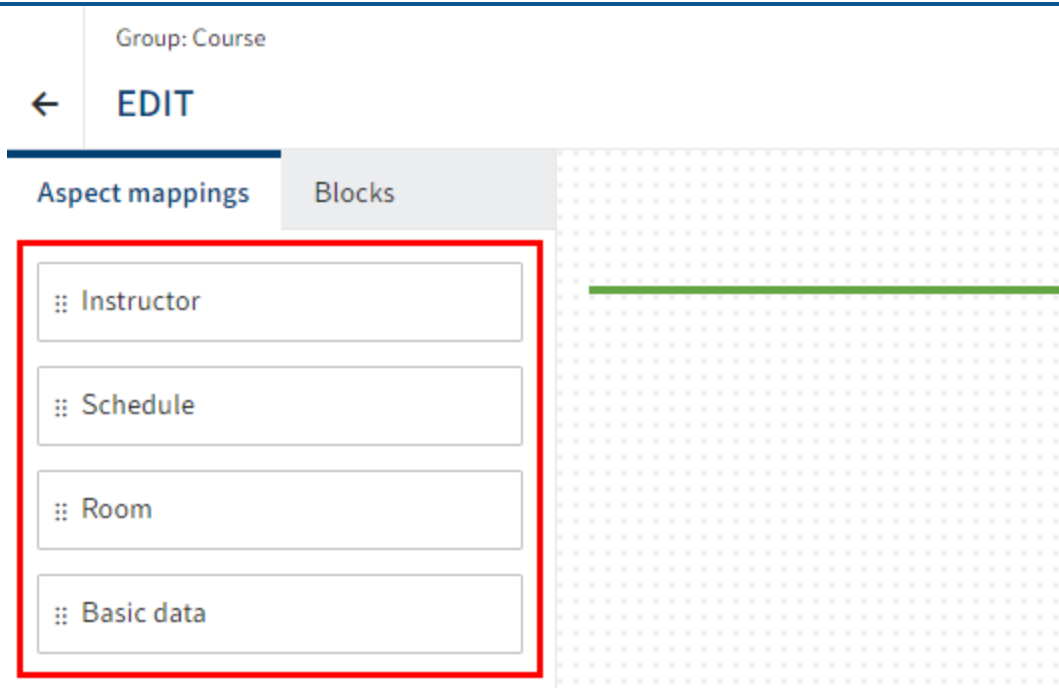
⌵ sord.name

⊕

⊕ Add block

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)

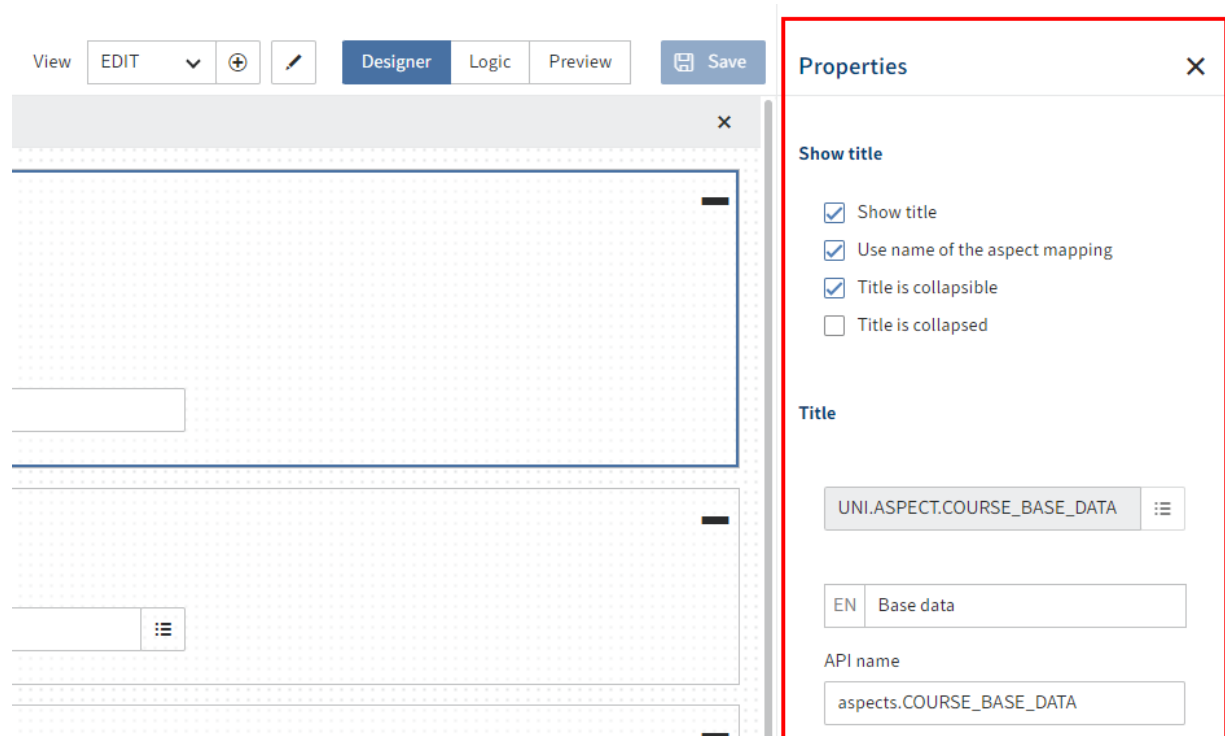


On the *Aspect mappings* tab, you will see the aspect mappings of the metadata form.

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:

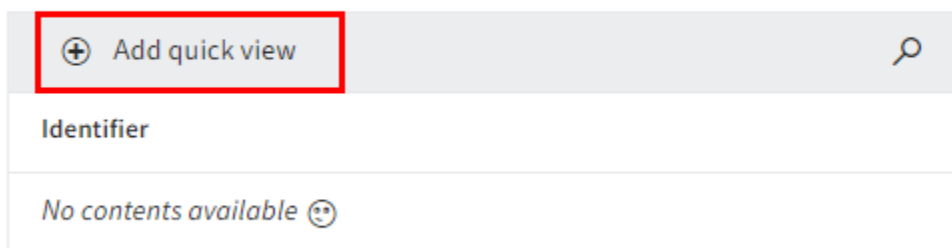
- Show title: If this option is enabled, the name of the aspect mapping is shown as the title. If available, translations are shown in other languages.
 - Use name of the aspect mapping: If this option is disabled, you can define an alternative title and, if applicable, corresponding translations using 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 quick view

You can create quick views for each metadata form as required. They are intended as a preview for relations and to present the most important data from the relation. The preview is shown when you move the mouse over the chain icon of a relation in the client.

▼ Quick views



Identifier
No contents available 😞

1.

Select *Add quick view*.

Create view

☒ Default view (RELATION)

☐ Assign any name

Label *

RELATION

OK Cancel

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

2. Select a type via the radio buttons.

Choose from the following options:

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

3. Select *OK*.

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

The next steps are the same as for Create views (see above) starting with step 4, but with a limited selection of options.

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.

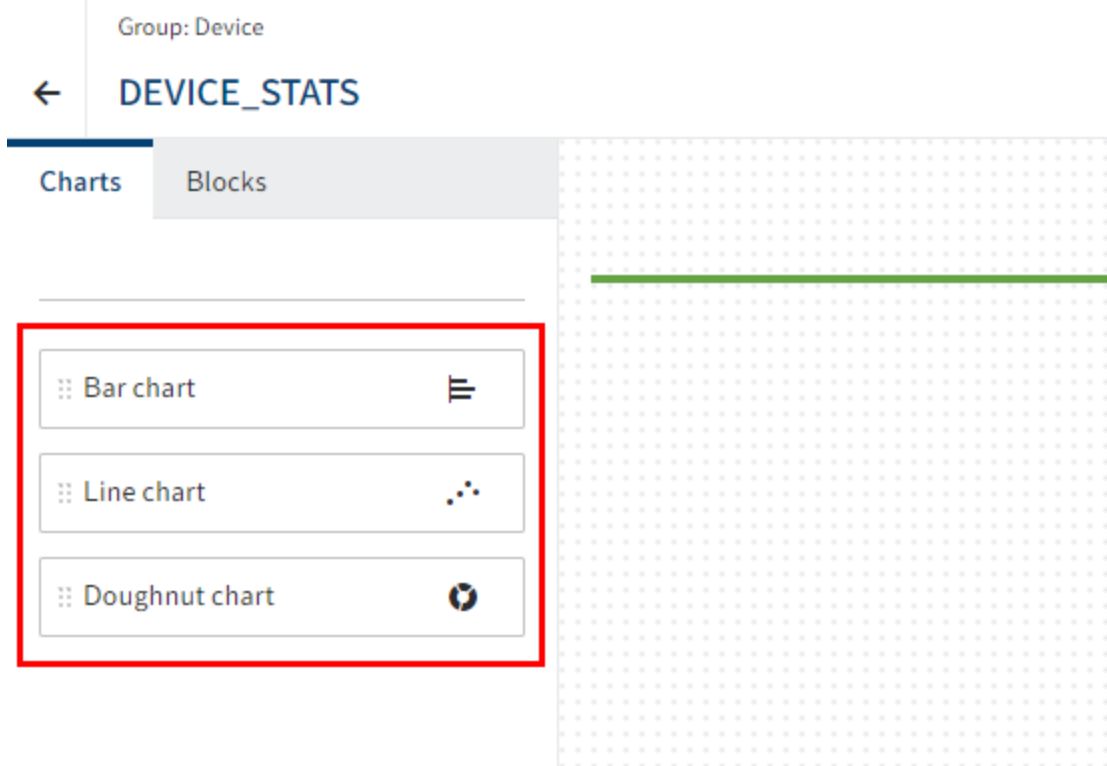
2. Enter a name for the dashboard.
3. Select one of the available translation variables from the drop-down menu. The *Display name* field is completed automatically.

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).

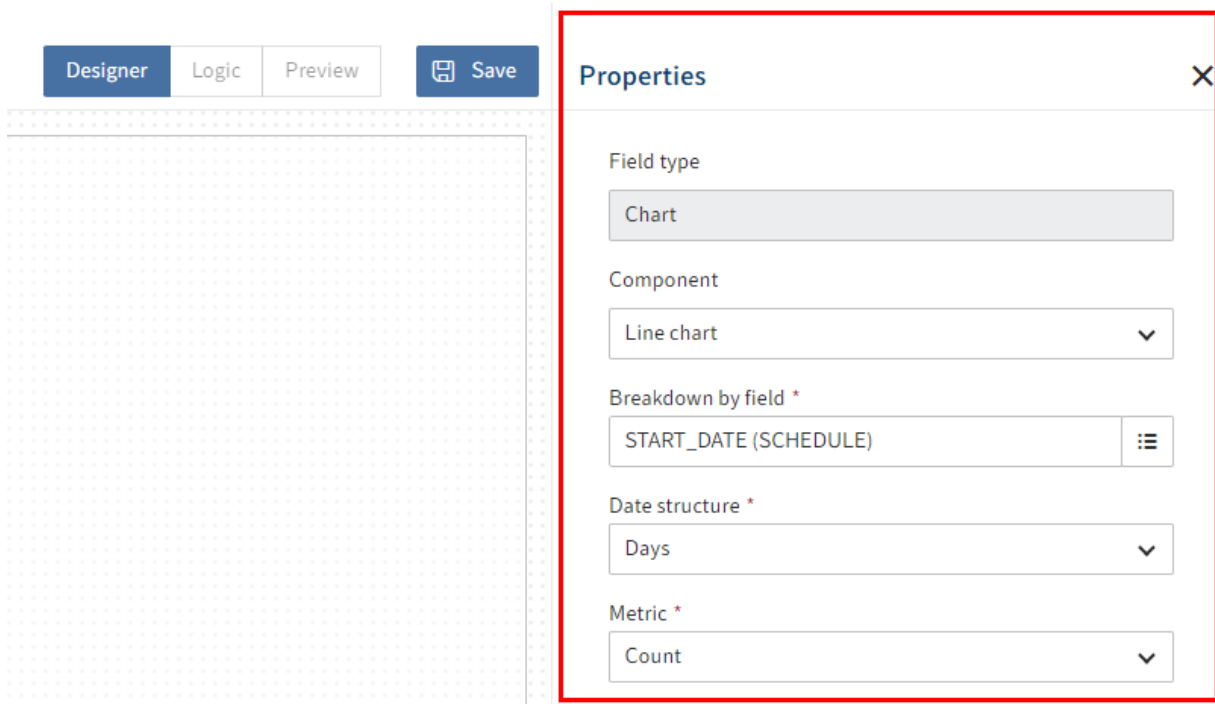
You will find more information about the elements and functions of the form designer under Forms (gen. 2)



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 *New entry* (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

 PERSON


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

Select metadata form

Search

 Provide metadata in 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 object ID 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 or via a quick view.

Refer to the Create quick views section for more information.

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.

Search

You can make the following settings in the *Search* area.

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

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 (3):

Contract number (basic contract data)

Contract partner (basic contract data)

Responsible (basic contract data)

☒ Basic contract data

Identifier	Name	Field type
NR_CONTRACT	Contract number	Text in general
CONTRACT_PARTNER	Contract partner	Text in general
RESPONSIBLE	Responsible	User

☐ Contract status

Identifier	Name	Field type
CONTRACT_STATUS	Contract status	Text in general
CONTRACT_TYPE	Contract type	Text in general

Example: You have a business object *contract 12346789* with the field *Contract number* and other fields. The child entries do not have these fields. If you want to find the child entries when searching for the contract number, for example, enable the option to provide metadata in child entries.

Please note

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

- The relevant metadata form must be enabled for use with business objects (*Metadata forms > Usage > Business object*).

Refer to the section 'Usage' tab > Usage for more information

- The *Provide for search in child entries* option must be enabled for the fields of the respective aspect (*Aspects > Field*).

Refer to the Aspects > Add fields section for more information

- The aspect mappings being provided must be enabled in the relevant metadata form. (see above)
- The *May be created multiple times* option MUST BE DISABLED.

Refer to the 'Contents' tab > Assign aspects section for more information.

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)* und *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	UNI.COURSE	Select entry type
Font color	System color	Select font color
Document status/sorting	Version control enabled/alphabetical ▼	
Document path	Standard document path	Select document path
Deletion period	Deletion period ⓘ	
Retention 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.
- By filing date descending: The entry with the most recent filing date is at the top.
- Alphabetical descending: Entries are sorted descending from Z-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 ⓘ

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

☐ 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.

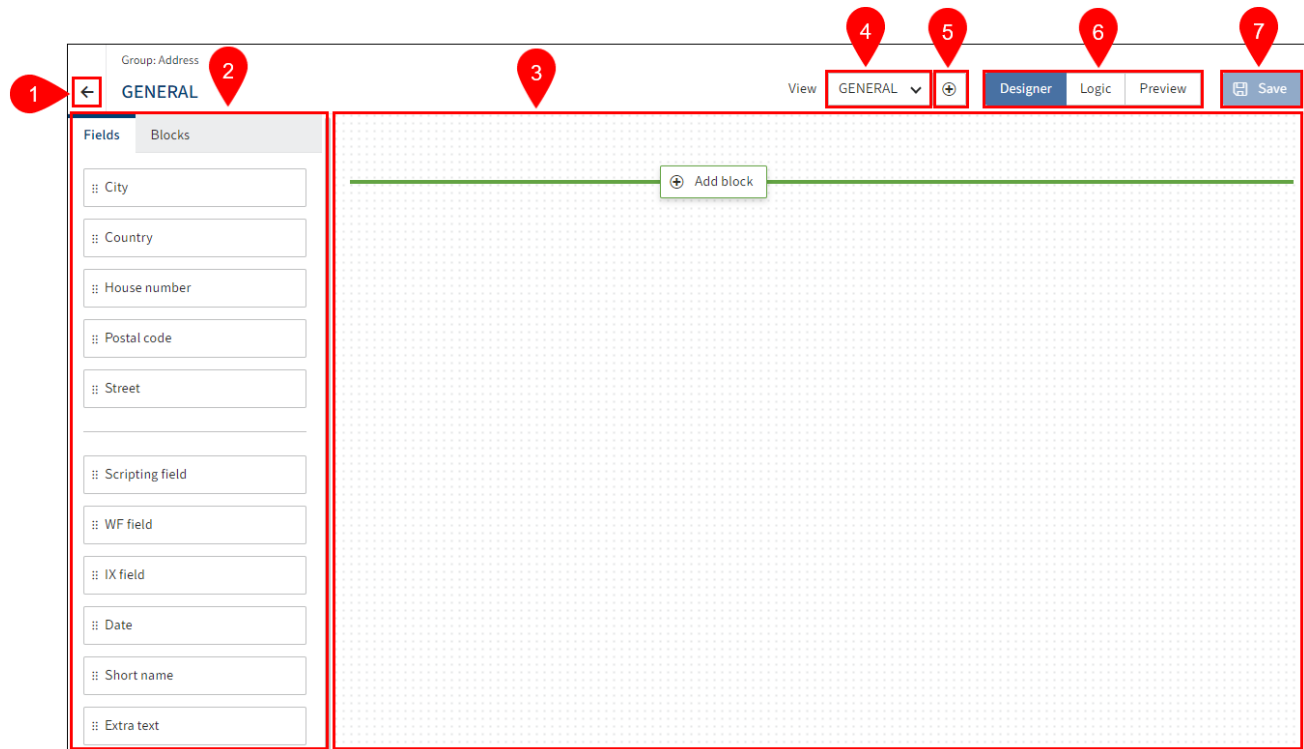
They are configured in the form designer (gen. 2) and are characterized by the following properties, among others:

- 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. You will find more information in the Logic chapter.
- Preview: To test the form functions and rendering with different screen sizes.

Edit form

Depending on the context and application, forms can be edited in different ways.

Add elements

To add contents to a form, you have to add elements to the form. The following sections address the different 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.

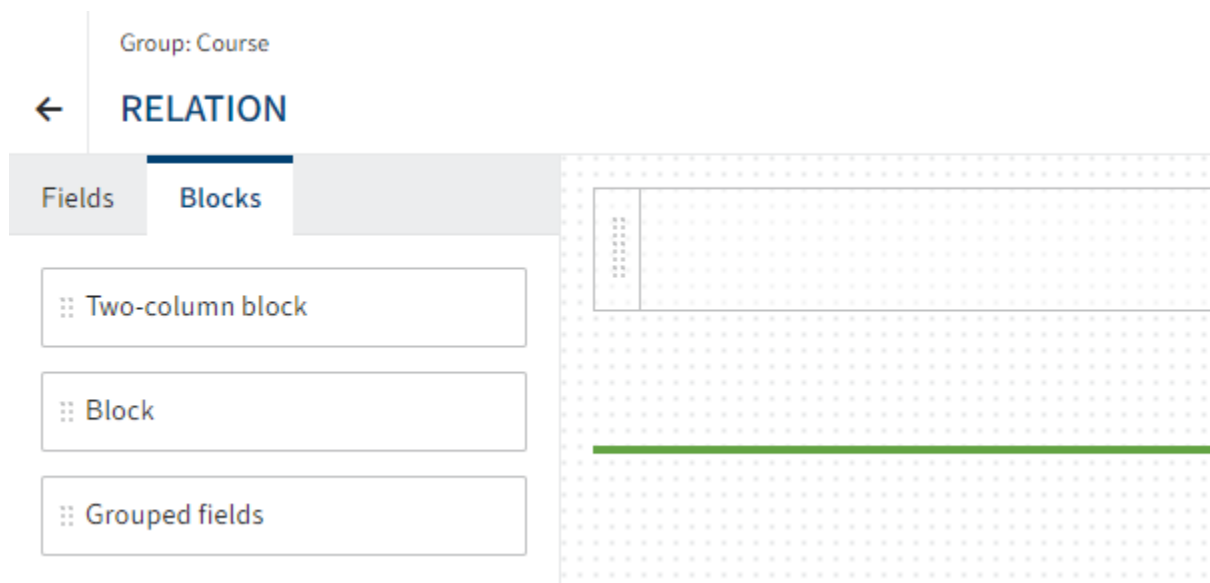
1. To place a field, drag it from the *Fields* tab to the layout area using drag-and-drop.
2. Drop it in the desired position.

Optional: You can move elements in the same way.

Grouped fields

For some fields, grouping makes sense, as the fields are closely related. With money for example, the field for the total and the field for the currency.

Follow the steps below to create grouped fields.

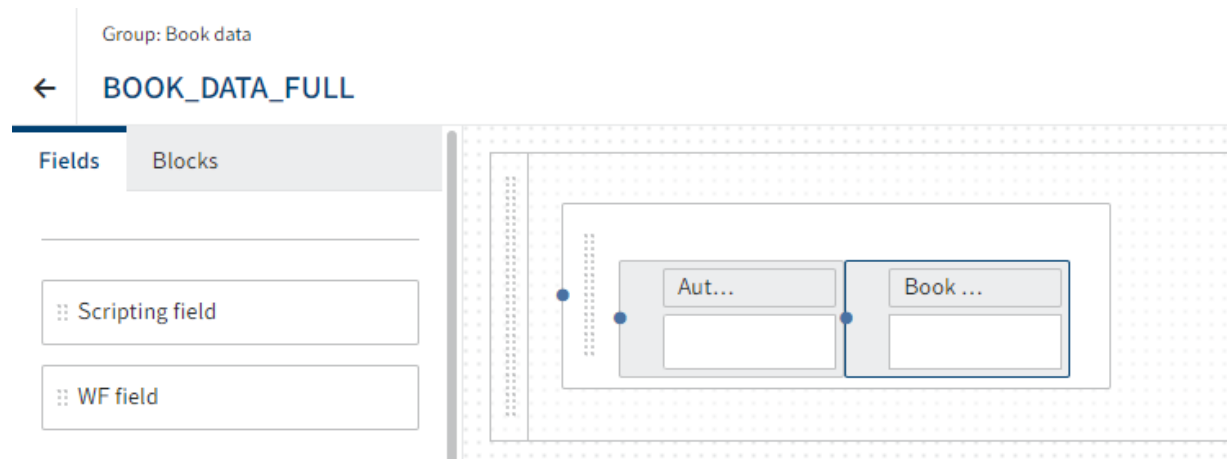


1. Switch to the *Blocks* tab.
2. Drag the *Grouped fields* block to the layout area.

A *Group* type field appears in the layout area.

Optional: Edit the field properties as needed under *Properties*.

3. Switch to the *Fields* tab.
4. Drag the first field to the *Group* type field.



5. Drag additional fields to the previous field.

Optional: Edit the field properties as needed under *Properties*.

Information

As soon as you have dragged fields to the *Group* type field, additional settings will become available for the field size of the individual fields. You can choose per field whether to automatically determine the size of the field or if you want to set a fixed value of *small*.

ISBN	Author

6. Select *Save*.

You have added multiple fields to a group.

Add block

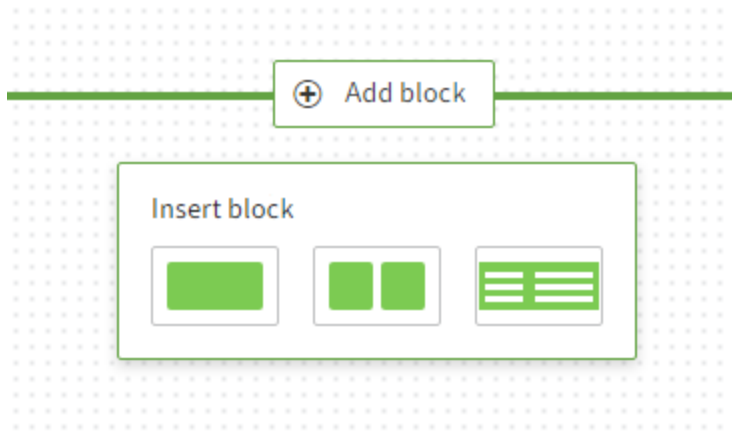
There are two ways to add a layout element (*block*):

- 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 independent block

For metadata forms, you can create separate form areas as independent blocks in addition to the aspects.

Independent block ⓘ



1. Select *Add* (plus icon) in the *Independent block* area.

The *Create independent block* dialog box opens.

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

Information

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

Alternative: Select one of the available translation variables from the drop-down menu.

- 3.

Enter a name in the *Display name* field.

4. Select OK to confirm.

This closes the dialog box. The new block appears in the *Independent block* area.

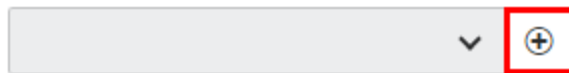
5. Drag the block to the layout area.

No view exists yet. The *Properties* area opens.

Independent block: Default fields

View

No views available



6. Select *Add* (plus icon) under *Properties* > *View*.

The *Create view* dialog box opens.

7. Enter a technical name for the view 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.

8. Select *OK* to confirm.

The form designer opens in a new browser tab. The fields that are not part of an aspect are available.

9. Drag the relevant fields to the layout area.
10. Select *Save*.
11. Close the browser tab.
12. Return to the browser tab with the original form.

Independent block: Default fields

View



The new view is now selected.

13. Select *Save*.

Selecting *Preview* displays the new view. The independent block is now available and can be applied to all metadata forms.

Create tabs

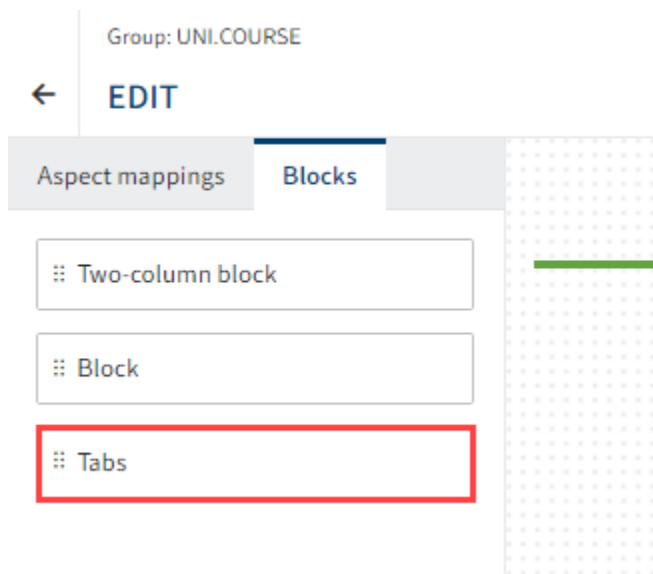
A form can be divided into tabs for a clearer structure. Follow the steps below.

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 screenshot shows the ELO Designer interface. At the top, there is a 'View' dropdown set to 'DEF' and a '+', followed by tabs for 'Designer', 'Logic', and 'Preview', and a 'Save' button. The main workspace contains two fields: 'House number' and 'City'. The 'House number' field is selected, and its properties are displayed in a 'Properties' panel on the right. The 'Properties' panel has a red border and contains 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

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

Min. characters

Max. characters

255

Regular expression

Error message for regular expression translation key

Error message for regular expression

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.

Alternatively, *Selection list* type fields can use the following components.

- Toggles
- Large buttons
- Phase visualization

Refer to the following/linked sections for more information.

Toggles

Component

Toggles

The following properties are available for the *Toggles* component:

Status

- ☐ In use
- ☐ In stock
- ☐ Under maintenance
- ☐ Defective
- ☐ To be disposed of

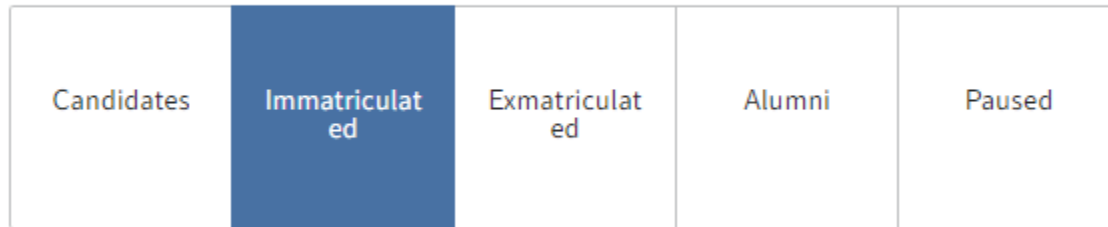
Status

In use
In stock
Under maintenance
Defective
To be disposed of

- 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.

Large buttons

Status



Fields with the *Large buttons* component present the values of a keyword list as tiles.

The selected value is highlighted.

- Arrange horizontally: Arranges the buttons next to one other. The arrangement depends on the available space and the selected size. With the default settings, they are arranged one below the other.

Phase visualization

▼ Warehouse capacity

Stock



Fields with the *Phase visualization* component present the values of a keyword list as phases of a process.

The values of the field cannot be edited directly via the field. The values of the field can be changed as follows:

- A different view: In the EDIT view of the metadata form, define an aspect view with an editable *Selection list* type component for the same aspect. The value can be changed in this view. Phase visualization is used for the VIEW view of the metadata form to display the value.
- ELO Flows: For example, the value can be set via the metadata component. For more information on ELO Flows, refer to the [ELO Flows](#) documentation.
- Scripting: For more information about scripting with ELO Forms, refer to the [ELO Forms scripting](#) documentation.

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 name	Can be inserted multiple times
WF field	Defines a WF MAP field with assignable name	Can be inserted multiple times
IX field	Defines an IX MAP field with assignable name	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 *large* by default. 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.

Information can be closed: If the *Information can be closed* option is enabled, an X icon appears on the field. The text can be hidden as needed by selecting the X icon.

Logic

You can configure and edit scripts on the *Logic* tab of the form designer.

Please note

Scripting is a preview feature and not yet intended for use in production environments.

The screenshot shows the 'Logic' tab in the ELO form designer. At the top, there's a header bar with 'Group: Documentation', a back arrow, 'EDIT', a 'View' dropdown set to 'EDIT', a '+' icon, and tabs for 'Designer', 'Logic' (active), and 'Preview'. A 'Save' button is on the right. Below the header, a red callout '1' points to the 'Global scripts' tab. A blue information bar states: 'Scripting is a preview feature and not yet intended for use in production environments.' Below this, a red callout '2' points to the 'Global scripts' dropdown menu. Underneath, there's a section with a '+' icon and 'Add new global script', followed by a 'Script name' input field. A red callout '3' points to the 'Scripts' dropdown menu. Below it, there's a section with a '+' icon and 'New script', followed by a 'Script name' input field. A red callout '4' points to the 'Events' dropdown menu, and a red callout '5' points to the 'Translation prefixes' dropdown menu.

The following actions are possible:

- 1 Create and edit global scripts
- 2 Load global scripts
- 3 Add and edit global scripts
- 4 Add and edit functions for events
- 5 Add and edit prefixes for translations

Refer to the following sections and the [Programming for ELO > ELO Forms scripting](#) documentation for more information.

Global scripts

Global scripts are scripts that are not bound to any specific aspect or metadata form. The scripts can be used for other packages.

Create and edit global scripts

The *Global scripts* link opens a new browser tab. You have the following options:

- Create and edit global scripts via the internal editor (full-screen mode possible)
- Upload global scripts
- Download global scripts

Load global scripts

You can load existing global scripts from the package or other packages.

The *Add new global script* function (plus icon) gives you the following options:

- Load existing global scripts
- Check global scripts in read mode (full-screen mode possible)
- Open global scripts for editing (pencil icon)
- Download global scripts

Add and edit global scripts

For scripts that are bound to the respective view of the aspect or metadata form.

The *New script* function (plus icon) gives you the following options:

- Create and edit scripts via the internal editor (full-screen mode possible)
- Upload scripts
- Download scripts

Add and edit functions for events

The *New event* function (plus icon) gives you the following options:

- Select existing events
- Assign an identifier
- Define triggering fields
- Create a function for the event (full-screen mode possible)

Add and edit prefixes for translations

The *New translations* function (plus icon) gives you the following options:

- Define prefixes for translations. These can be addressed via PROPERTIES files in the repository or the translation table.
- See how many translations there are for a prefix

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 of the 'STUDENT_STATUS' list is shown, including its identifier, name, and a list of keywords with their corresponding status indicators.

Keyword lists table:

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

STUDENT_STATUS keyword list details:

Identifier: * STUDENT_STATUS

Name: EN Status Edit translation

Keywords:

Identifier	Name	Preview
APPLICANT	Candidates	Candidates
ENROLLED	Immatriculated	Immatriculated
EXMATRICULATED	Exmatriculated	Exmatriculated
ALUMNI	Alumni	Alumni
PAUSE	Paused	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		
StudiAdm <	≡ Keyword lists	
100 Level: Basic	⊕ Add keyword list	
≡ Metadata forms	Identifier	Name
≡ Aspects	BUILDING	Building
≡ Groups	COUNTRY	Country
≡ Keyword lists	E_MAIL_TYPE	Type of e-mail address
≡ Entry types	FEE_STATUS	Fee status
≡ Workspace types	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 a web interface for editing a keyword list. At the top, there's a breadcrumb 'Keyword list' and a back arrow. Below it, the list name 'STUDENT_STATUS' is displayed. A toolbar contains 'Import keyword list' and 'Delete keyword list' buttons. The 'Identifier' field is set to 'STUDENT_STATUS'. The 'Name' field shows 'EN' and 'Status', with 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.

The identifier must be unique within the respective package.

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: Select a color value for the keyword from the *Color* drop-down menu. The colors are used in workspaces in tables or for status filters above tables, for example.

Optional 3: Repeat these steps 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.

▼ Stichworte *

⊕ Stichwort hinzufügen			🔍
	Bezeichner	Name	Vorschau
⋮	IN_USE	Im Einsatz	● Im Einsatz
⋮	IN_STORAGE	Im Lager	● Im Lager
⋮	MAINTENANCE	In Wartung	● In Wartung
⋮	DEFECTIVE	Defekt	● Defekt
⋮	DISPOSAL	Wird entsorgt	● Wird entsorgt

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

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, a table lists existing entry types. On the right, a form allows for editing or adding a new entry type. Red callout numbers 1 through 5 highlight key UI elements.

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

The right-hand form for editing the 'COURSE' entry type includes the following fields:

- Identifier ***: COURSE
- Name**: EN | Course (with an 'Edit translation' button)
- Type**: Radio buttons for Document and Folder (Folder is selected)
- Icon ***: A selection box with a 'Select icon' button and a large dashed box for drag-and-drop. Below the dashed box is the text 'Add icon via drag-and-drop or select icon'.
- 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.