iKnowBase®

MetadataReference

1. iKnowBase Meta Modelling Reference

Welcome to iKnowBase! This is the on-line documentation for iKnowBase. Please enjoy!

1. iKnowBase Meta Modelling Reference....2
2. Attribute Types....3
   1. Attribute Type Properties....3
3. Dimension Types....6
   1. Dimension Types Properties....6
      1. Label and description....6
   2. Tasks....6
4. Dimensions....7
   1. Dimension Properties....7
      1. Label and description....7
   2. Tasks....8
      1. Moving a Dimension....8
      2. Assigning an Access Control List to a Dimension....8
      3. Associating a Dimension with a Dimension Type....8
5. Document Types....10
   1. Document Type Properties....10
      1. Label and description....10
   2. Tasks....13
      1. Associating an Document Type with an Attribute Type....13
6. Site....14
   1. Site Properties....14
      1. Label and description....14
7. Value Lists....15
   1. Value List Properties....15
      1. Label and description....15

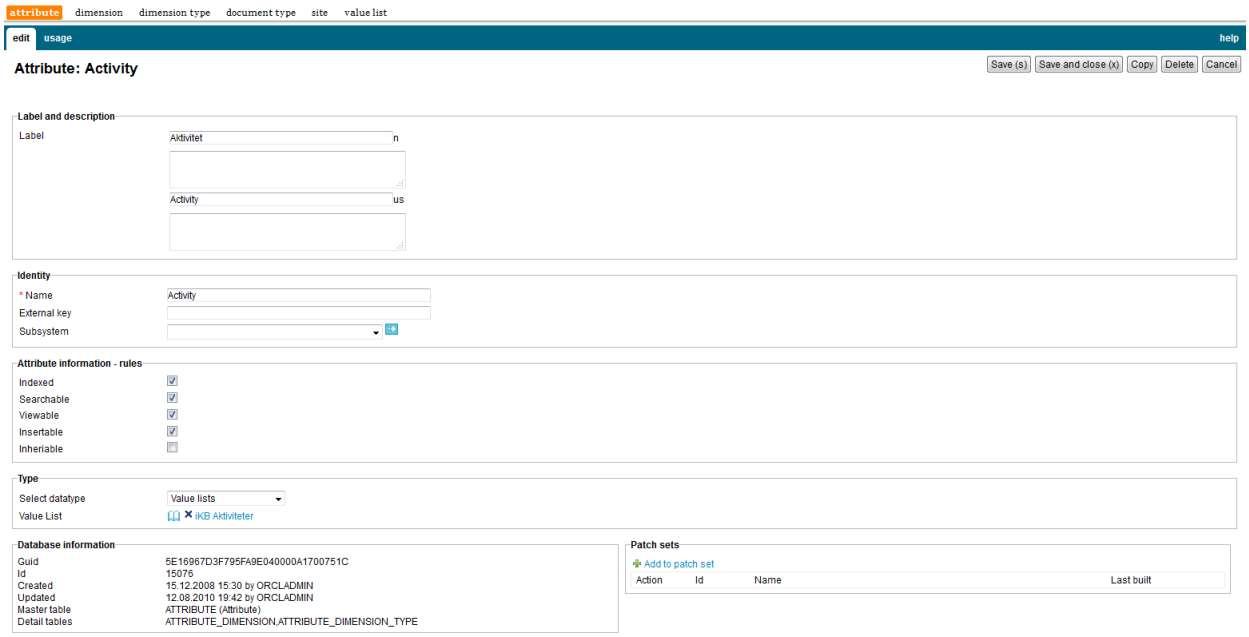
2. Attribute Types

You can use attribute types to categorize and retrieve content. Attribute types enable you to define the metadata that can be associated with the content. You can create your own attribute types or use attribute types that are available by default. You can associate various attribute types with an document type.

You must associate every attribute type with a data type that defines the type of metadata that the attribute type can store.

Attribute Type Properties

This section describes the properties of an attribute type, as shown on the corresponding **Edit** pane.



Property	Description
Label (language)	Type a label and description for this attribute type. One entry per supported language.
Name	Type a name for this attribute type.
External key	Type an additional identifier for this attribute type. An external key is used in code that integrates external services with this iKnowBase attribute type.
Subsystem	Choose a subsystem in which this attribute type is used.
Indexed	Select this check box to make this attribute type indexed and thereby searchable using free text search.
Searchable	Select this check box to make this attribute type searchable for advanced searches.
Viewable	Select this check box to make this attribute available in the list of attributes while creating a presentation style.
Insertable	Select this check box to make this attribute type available in the list of attribute types while creating a form.

Inheritable	Select this check box to enable subdocuments to inherit this attribute type from the master information object.
Datatype	Click the appropriate data type for the value of this attribute type. Available options are: • **CHAR**: Stores characters. • **CLOB**: Stores character set data. • **DATE**: Stores point-in-time values (date and time). • **DIMENSION**: Stores references to dimensions. • **DOCUMENT_FIELD**: Stores system attribute types. **Note**: It is not possible to create or delete attribute types of this data type. • **DOCUMENT_LINK**: Stores references to related information objects. • **EXTERNAL**: Stores references to data in a source that is external to iKnowBase. The purpose of external attribute types is to be able to tag iKnowBase information objects with metadata which are defined outside of iKnowBase, ie. in another system. These attributes can be used as ordinary iKnowBase attributes in Viewers, Forms and Search Sources. They require an external source, which contains procedures to support lookups and value lists. See *iKnowBase Development Guide* for information on how to implement this. • **FILE**: Stores binary data. • **NUMBER**: Stores fixed and floating-point numbers. • **PICTURE_LINK**: Stores references to information objects containing images. • **VALUELIST**: Stores values from predefined value lists. • **USER**: Stores user identification. • **ACL**: Stores access control list information. • **DOCUMENT_TYPE**: Stores document type.
Length	This property is available when you select the **Char** data types. Type the maximum number of characters that the user can store for the **Char** data type.
Value list	This property is available when you select the **Value list** data type. Select the value list for this attribute type.
Document reference	This property is available when datatype is set to DOCUMENT_FIELD. It contains a reference to the column in the DOCUMENT table in which attributes for information objects will be stored. **Note**: You cannot update the information of this property.
Max number of values	This property is available when you select the **Dimension** data type. Type the maximum number of values that can be selected for this attribute type.

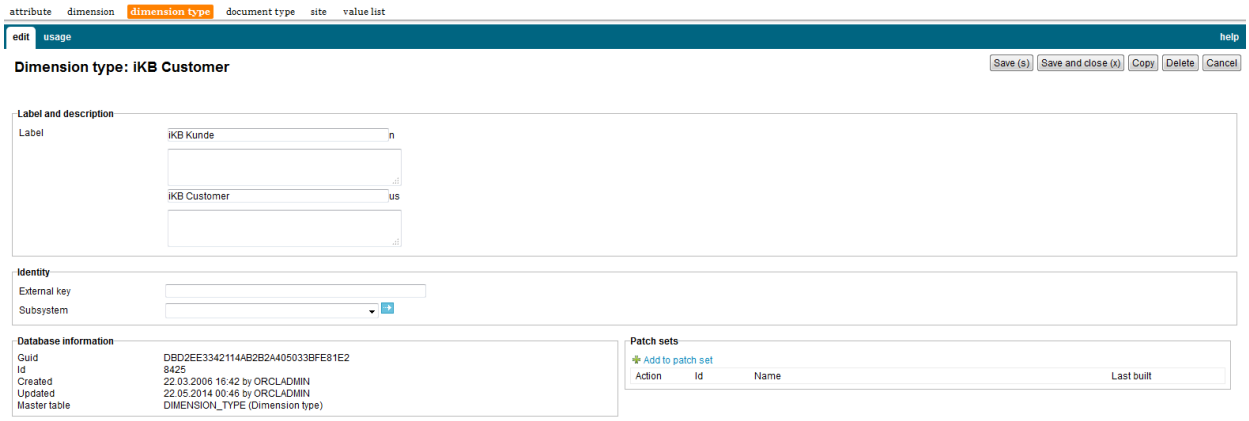
	You can override this value while creating a form.
Dimensions	This property is available when you select the **DIMENSION**, **PICTURE_LINK**, and **DOCUMENT_LINK** data types. Displays a list of dimensions which can be used for this attribute type. This limits which dimensions are selectable for an attribute in a form. The selected dimension(s) and their sub dimensions will be available.
Dimension types	This property is available when you select the **DIMENSION** data type. Displays a list of dimension types which this attribute type is associated with. This limits which dimensions are selectable for an attribute in a form. Dimensions with the selected dimension type(s) will be available. If no dimension type is selected, all dimensions for the given dimension structure are available for this attribute type.
External source	This property is available when you select the **EXTERNAL** data type. Type the external API source; `<schema>.<api-package>`. The API needs to contain procedures to support lookups and value lists. See *Development Guide* for further information.

3. Dimension Types

A dimension is a tree structure with various levels. For example an organization tree, with people, departments, and sections. You can create dimension types to group together multiple dimensions with similar characteristics.

Dimension Types Properties

This section describes the properties of a dimension type, as shown on the corresponding **Edit** pane.



Label and description

Property	Description
Label (language)	Type a label and description for this dimension type. One entry per supported language. This is the display name for the dimension type.
External key	Type an additional identifier for this dimension type. An external key is used in code that integrates external services with this iKnowBase dimension type.
Subsystem	Choose a subsystem in which this dimension type is used.

Tasks

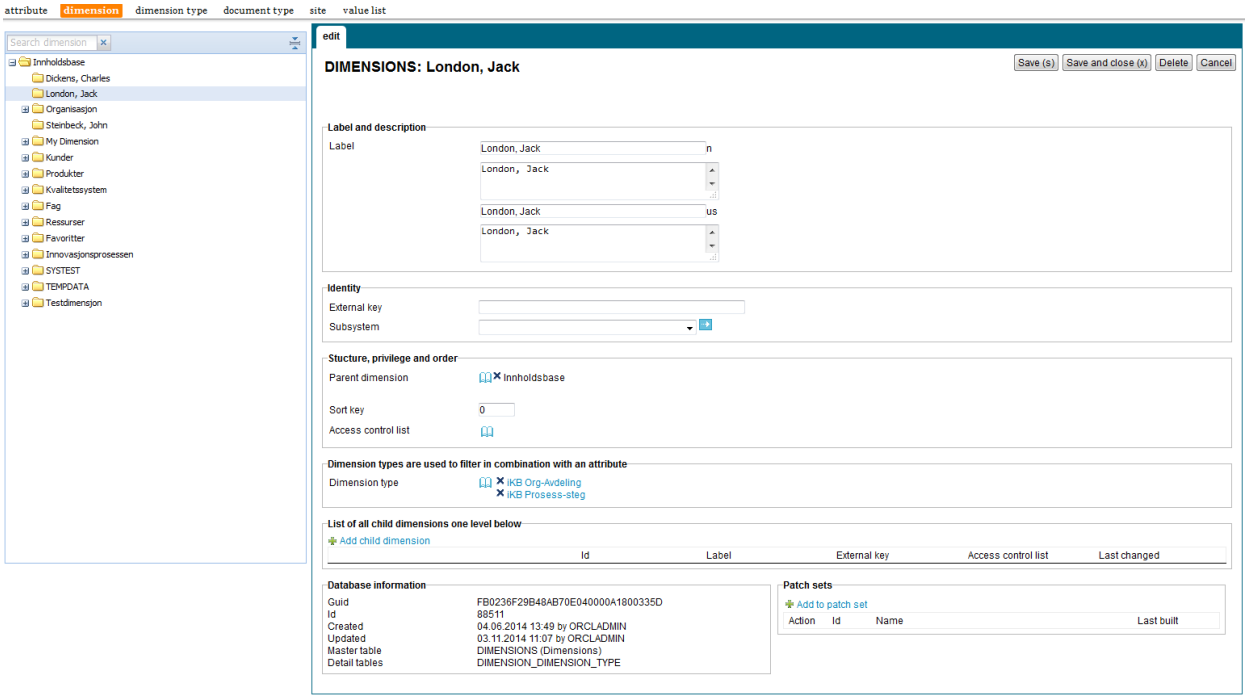
See earlier chapter for information about common tasks like create, view, copy, update, and delete.

4. Dimensions

Dimensions enable you to categorize, group, label, and filter content. Dimensions provide structured context information to otherwise unstructured content. You can associate dimensions with information objects by using attribute types.

Dimension Properties

This section describes the properties of a dimension, as shown on the corresponding **Edit** pane.



Label and description

Property	Description
Label (language)	Type a label and description for this dimension. One entry per supported language. This is the display name for the dimension.
External key	Type an additional identifier for this dimension. An external key is used in code that integrates external services with this iKnowBase dimension.
Subsystem	Choose a subsystem in which this dimension is used.
Parent dimension	This property is set when creating a dimension, and contains a reference to this dimensionï¿½s parent dimension.
Sort key	Type a key to set the order in which the dimensions are displayed.
Access control list	Select the appropriate access control list (ACL) to assign that access control list to this dimension. The access control list is used to authorize users for viewing and tagging with this dimension.
Dimension types	Displays a list of dimension types for this dimension. Supported actions are add and removal of dimension types

Child dimensions	Displays all subdimensions on the level below this one. Supported actions are add, reorder and edit. Add new sub dimensions by clicking “Add child dimension”, then enter a label (and external key if needed). To set other properties for the sub dimension, select the dimension from the tree viewer on the left hand side.

Tasks

See earlier chapter for information about common tasks like create, view, copy, update, and delete. This chapter describes specific tasks for dimensions.

Note: Actions for performing tasks related to dimensions are available on the **Edit** pane for a dimension.

Note: It is not possible to copy a dimension.

Moving a Dimension

You might need to move a dimension if it is not created at the correct level within the dimension structure. You can move a dimension to another level in the same dimension tree or to a different dimension tree.

To move a dimension, perform the following steps:

1. On the **List** pane for dimensions, click the dimension that you want to move.
2. On the **Edit** pane, click the **Change** link next to the **parent dimension** field.
   - The dimension navigator opens.
3. Click the new parent dimension in the dimension navigator to select it.
   - The **Edit** pane is updated with the selected parent dimension, and the dimension navigator closes.
4. Click **Save**.
   - iKnowBase moves this dimension to the selected dimension level in the dimension tree.

Note: To change the display order of dimensions at the same level, use the property Sort key.

Assigning an Access Control List to a Dimension

To assign an access control list to a dimension, perform the following steps:

1. On the **Edit** pane for the dimension, click the **Change** link next to the **Access control list** field.
   - A window containing a list of existing access control lists appears.
2. Click on the **select** action for the access control list you want to add to the attribute type.
   - The **Edit** pane is updated with the selected access control list, and the window containing the list of existing access control lists closes.
3. Click **Save**.

Note: Click the **Clear** link to remove the access control list from the dimension.

Associating a Dimension with a Dimension Type

To add a dimension type to a dimension, perform the following steps:

1. On the **Edit** pane for the dimension, click on the select box next to the **Dimension type** label.
   - A window containing a list of existing dimension types appears.
2. Click on the **select** action for the dimension type you want to add to the dimension.
   - The selected dimension type is added to the list of dimension types in the **Edit** pane, and the window containing the list of existing dimension types closes.
3. Click **Save**.

To remove a dimension type from an a dimension, perform the following steps:

1. On the **Edit** pane for the dimension, click on the **remove** action for the dimension type you want to remove.

- The dimension type is removed from the list.

2. Click **Save**.

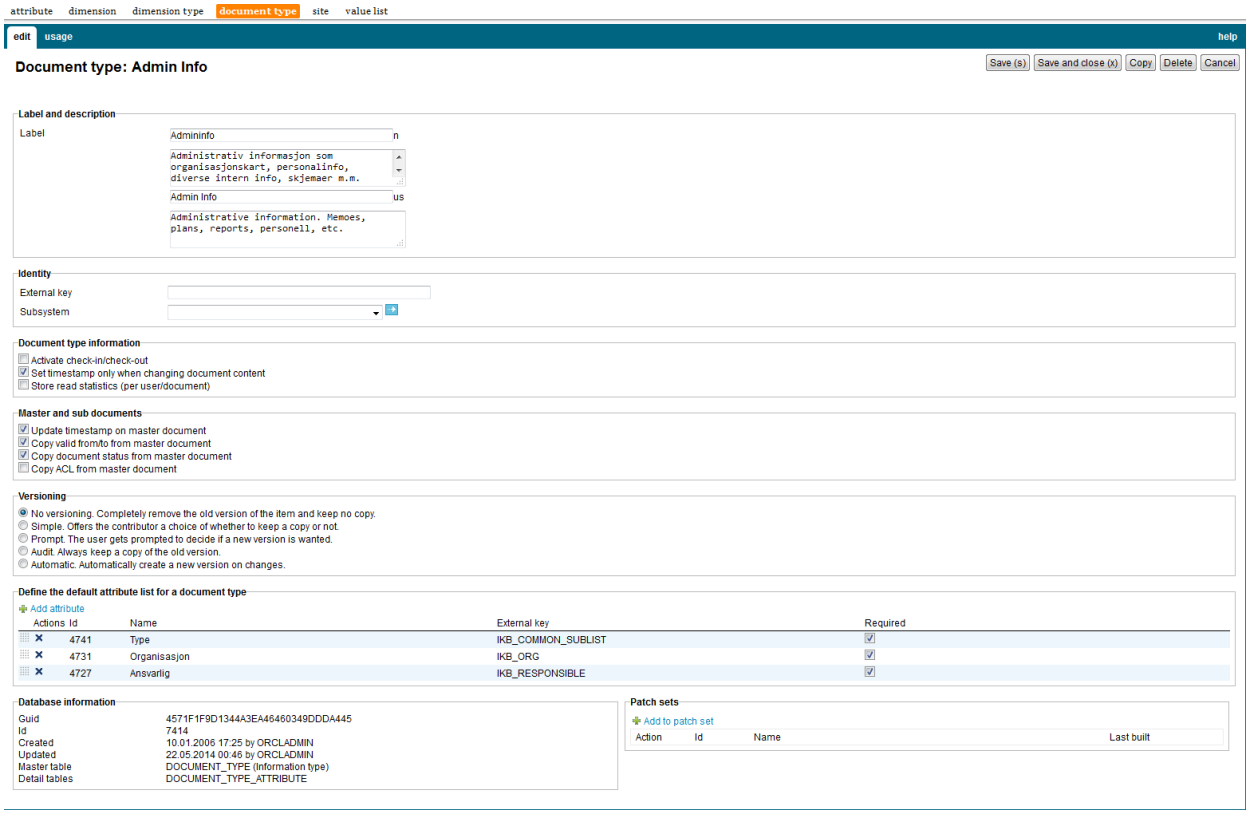
5. Document Types

Document types are used to define various types of content that can be stored in the iKnowBase portal. Creating an document type is the first step in categorizing content.

Document Type Properties

This section describes the properties of an document type, as shown on the corresponding **Edit** pane.

Label and description



Property	Description
Label (language)	Type a label and description for this document type. One entry per supported language.
External key	Type an additional identifier for this document type. An external key is used in code that integrates external services with this iKnowBase metadata object.
Subsystem	Choose a subsystem in which this document type is used.
Activate Check in/out	Select this check box to enable the check in and check out functionality for the information objects of this document type. If this functionality is enabled, when the user needs to update an information object, the user must check out the information object before updating it. If an information object is checked out by another user, the information object is locked until it is checked in. This functionality ensures that only one user can update an information object at a given time.

Set timestamp only when changing document content	Select this check box if you want the timestamp of an information object to be updated only when the content of the information object is updated. If not selected both content and metadata update to an information object will cause the timestamp to be updated.
Store read statistics (per user/document)	Select this check box to record user statistics for information objects of this document type. When you select this check box, iKnowBase maintains a log of information objects created, read, modified, and deleted. The log data is written to the **LOG_DOCUMENTS** database table. If this check box is selected an input field for number of days to store statistics will appear. Type the number of days for which you want iKnowBase to maintain user statistics for information objects of this document type. If you want to maintain the log data permanently, type 0.
Update timestamp on master document	Select this check box to update the timestamp of the master information object when one of its subdocuments is updated.
Copy valid from/to from master document	Select this check box if you want the validity period of the document's subdocuments to be the same as the validity period of the document itself. If the validity period of the document is changed, the validity period of its subdocuments will be updated.
Copy document status from master document	Select this check box if you want the status of the document's subdocument to be the same as the status of the document itself. If the status of the document is changed, the status of its subdocuments will be updated.
Copy ACL from master document	Select this check box to if you want the Access Control List of the document's subdocuments to be the same as the Access Control List of the document itself. If the Access Control List of the document is changed, the Access Control List of its subdocuments will be updated.
No versioning	Click this version type if you do not want iKnowBase to maintain copies of an information object.
Simple	Click this version type if you want the capability to decide whether you want iKnowBase to keep copies of the information object, while saving changes to this information object. When a user selects **Simple** version control for an information object, the user can choose from the following options: • Update the active version without maintaining a copy of the information object. • Create a copy of the new version of the information object and set it as the active version. Create a copy of the new version of the information object without setting it as the active version.

Prompt	Click this version type if you want iKnowBase to prompt you whether you want iKnowBase to keep copies of the information object, while creating the information object. When a user selects **Prompt** version control for an information object, the user can select to use **Simple** version control while creating an information object.
Audit	Click this version type if you want iKnowBase to maintain each copy of an information object. When a user selects **Audit** version control for an information object, the user can set the new version of the information object as the active version.
Automatic	Click this version type if you want iKnowBase to automatically create a copy when changes are made to the information object. The latest copy of an information object is automatically set as the active version.
Number of versions to keep	This property appears after you select a **Version type** other than **No versioning**. Type the maximum number of versions that iKnowBase must maintain for each information object of this document type. For example, if you set **Number of versions to keep** to 10, iKnowBase saves ten versions of the information object. When the 11th version is saved, iKnowBase deletes the oldest version.
Allow switch of active version	This property appears after you select a **Version type** other than **No versioning**. Select this check box to allow the user to choose a different version as the active version of the information object.
Allow editing of non-active versioned document	This property appears after you select a **Version type** other than **No versioning**. Select this check box to allow users to edit any inactive version of the information object.
Attributes	Displays a list of attribute types which this document type is associated with. You can associate multiple attribute types with an document type. You can also make an attribute type required. When you create a form for this document type, the attribute types that you associated with the document type are automatically selected. When you use dynamic attribute types in a form, you can select only those attribute types that you associated with the document type.

Tasks

See earlier chapter for information about common tasks like create, view, copy, update, and delete. This chapter describes specific tasks for document types.

Associating an Document Type with an Attribute Type

To add an attribute type to an document type, perform the following steps:

1. On the **Edit** pane for the document type, click on the action **Add attribute**.
   - A window containing a list of existing attribute types appears.
2. Click on the **select** action for the attribute type you want to add to the document type.
   - The selected attribute type is added to the list of attribute types in the **Edit** pane, and the window containing the list of existing attribute types closes.
3. Click Save.

Note: Click on the **Add multiple attributes** action if you want to add more than one attribute type. The window containing the list of existing attribute types will remain open until you explicitly close it by clicking on the **Close** button. Each time you click on the **select** action for an attribute type, this attribute type will be added to the list of attribute types in the **Edit** pane.

To remove an attribute type from an document type, perform the following steps:

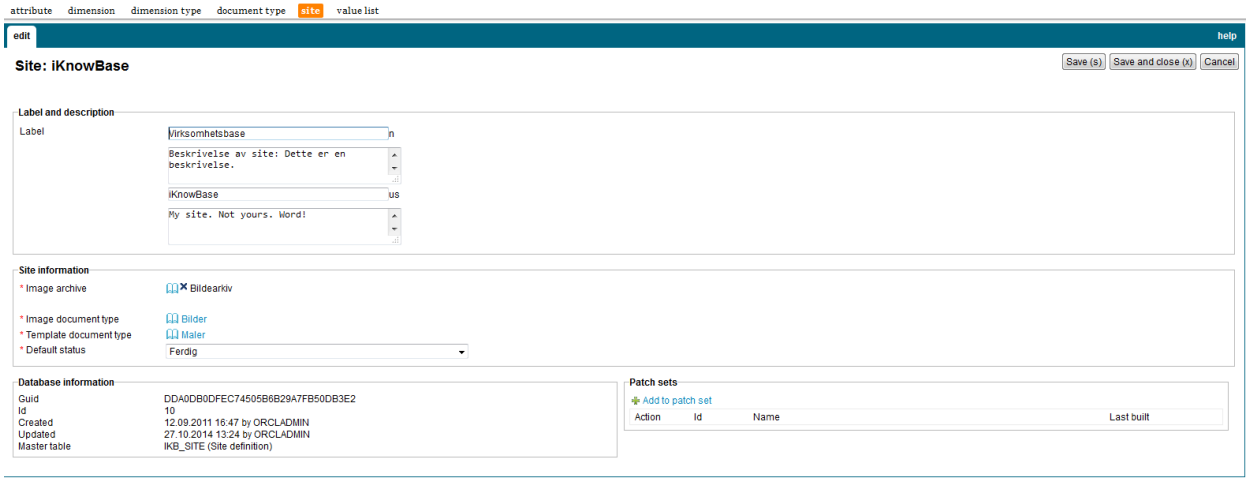
1. On the Edit pane for the document type, click on the remove action for the attribute type you want to remove.
   - The attribute type is removed from the list.
2. Click Save.

To reorder the attribute type list for an document type, perform the following steps:

1. On the Edit pane for the document type, drag the mostleft icon action for the attribute types you want to move until the order of the attribute types is as you like.
2. Click Save.

6. Site

Site provide information about the current iKnowBase portal instance. An iKnowBase portal instance is called a **site**. Each customer has a separate iKnowBase site and each siteï¿½s settings might be different, depending on the customerï¿½s requirements. The administrator of the iKnowBase portal can update the settings for a site.



Site Properties

This section describes the properties of site, as shown on the corresponding **Edit** pane.

Label and description

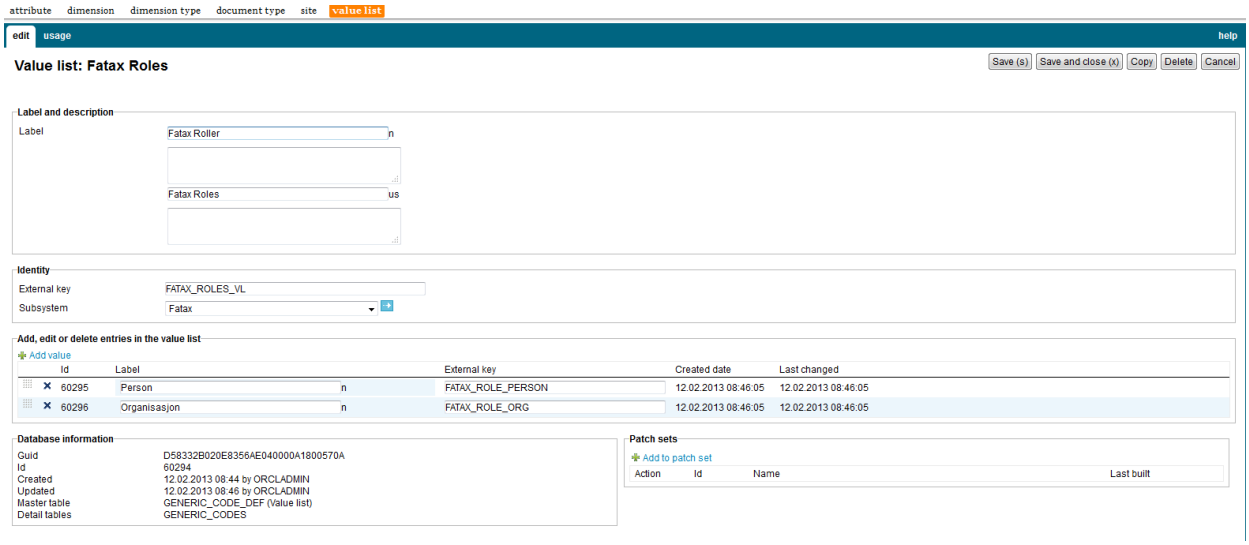
Property	Description
Label (language)	Type a label and description for this site. One entry per supported language. This is the display name for the site.
Image archive	Contains the root level of the image archive in the dimension tree.
Image document type	Click the appropriate document type for all images that are added to the iKnowBase image archive.
Template document type	Click the appropriate document type for templates that are created in iKnowBase. All information objects of this document type are available as a template in the publishing desktop.
Default status	Decides the default document status if not given during the creation of the document

7. Value Lists

Value lists enable you to create a predefined set of values. A value list attribute type is associated with a value list. When categorizing and searching content for this attribute type, only the values that are defined in value lists are available.

Value List Properties

This section describes the properties of a value list, as shown on the corresponding **Edit** pane.



Label and description

Property	Description
Label (language)	Type a label and description for this value list. One entry per supported language. This is the display name for the value list.
External key	Type an additional identifier for this value list. An external key is used in code that integrates external services with this iKnowBase dimension type.
Subsystem	Choose a subsystem in which this value list is used.
Entries in the value list	Displays the list of values for the value list. To add new values, use the **Add value** link. Other permitted actions are reorder and removal of an entry.
Label (language)	Type a label and description for this value. One entry per supported language. This is the display name for the value.
External key	Type an additional identifier for this value. An external key is used in code that integrates external services with this iKnowBase value.