20.1 Adding Metadata

> ℹ️ Metadata support is available starting from FileCloud 18.1.

You can manage data that provides additional information about files and folders available in FileCloud Server using **Metadata.**

FileCloud defines two levels of metadata definition:

1. Attribute - defines a single piece of information that user can specify for file or folder.
2. Metadata set - a group of related attributes with additional properties and settings. It works as a container for attributes.

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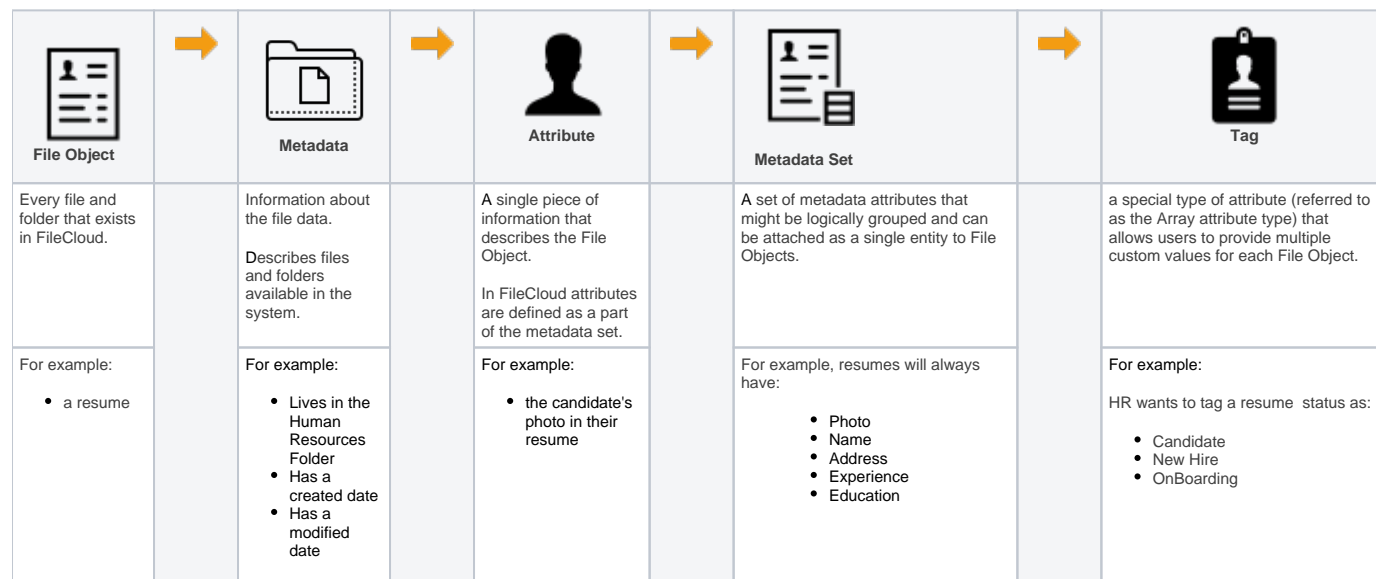
Your Administrator must grant you permission before you can see the Metadata tab in the User Dashboard.

Ask your Administrator to grant you permission to access Metadata. Your administrator can grant the following types of permissions:

- Write access - you can add metadata sets to files and folders, edit respective values and remove sets.
- Read access - you can ONLY view values of the already associated metadata sets.

What do you want to do?

Figure 1. Metadata Terms

File Object		Metadata		Attribute		Metadata Set		Tag
Every file and folder that exists in FileCloud.		Information about the file data. Describes files and folders available in the system.		A single piece of information that describes the File Object. In FileCloud attributes are defined as a part of the metadata set.		A set of metadata attributes that might be logically grouped and can be attached as a single entity to File Objects.		a special type of attribute (referred to as the Array attribute type) that allows users to provide multiple custom values for each File Object.
For example: • a resume		For example: • Lives in the Human Resources Folder • Has a created date • Has a modified date		For example: • the candidate's photo in their resume		For example, resumes will always have: • Photo • Name • Address • Experience • Education		For example: HR wants to tag a resume status as: • Candidate • New Hire • OnBoarding

The following rules apply to all files and folders and their metadata when you perform an operation:

Operation	Rule
a new file or folder is created	a default metadata set is automatically attached to it with all attribute values populated with default values defined
a new file or folder is uploaded	a default metadata set is automatically attached to it with all attribute values populated with default values defined
a file or folder is copied	metadata values **are not** copied. The Default metadata set with default values will be added to the new File Object.

a file or folder is moved	associated metadata values are also moved. The metadata points to the original file or folder during its lifetime.
a file or folder is renamed	associated metadata values are also renamed. The metadata points to the original file or folder during its lifetime.
a file is removed and moved to the recycle bin	the associated metadata values are updated so they point to the file in the recycle bin.
a file is permanently removed from FileCloud Server	the associated metadata values are removed as well.

Metadata Panel is available on the right hand side panel, next to Details and Activity Panels. It will only appear when both activity panel and metadata panel are enabled. Otherwise it will be hidden. This panel displays the following:-

- all metadata related information for the selected file or folder.
- a list of available metadata sets that can be added for the particular File Object.
- a list of associated metadata sets with corresponding attribute values.

To add a metadata set to a file or folder:

1. Select one of the available metadata sets. NOTE: The metadata set must not already be attached.
2. Click the *Add* button.
3. The newly added metadata set with corresponding attributes will be displayed.
4. You can edit the default values if necessary.

To remove the metadata set association:

1. Click the *Remove metadata set* icon.

- A confirmation will appear
- Once confirmed the respective values will be removed as well
- This operation cannot be undone

Watch a video about Associating Metadata Sets with File Objects.

Users with write permissions can edit attribute values for a given metadata set. Once corresponding "Save" button is clicked, values are validated and saved when validation succeeds.

Watch a video on Editing Attribute Values.

Searching for Metadata.