



StreamServe Persuasion SP5 Document types and metadata

User Guide

Rev A

StreamServe Persuasion SP5 Document types and metadata User Guide
Rev A
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Introduction to document types and metadata

Metadata attached to documents can be used in different types of scenarios, for example to:

- Search for documents in databases.
- Write personalized texts in Composition Center.
- Create business rules in Composition Center.
- Sort and envelope documents.

In Design Center, you can specify the metadata to add to invoices, orders, etc. To do this, you create document type resources that contain the metadata (one document type resource for each type of document), and connect the document type resources to the appropriate Design Center objects (Message or output connector in runtime configuration).

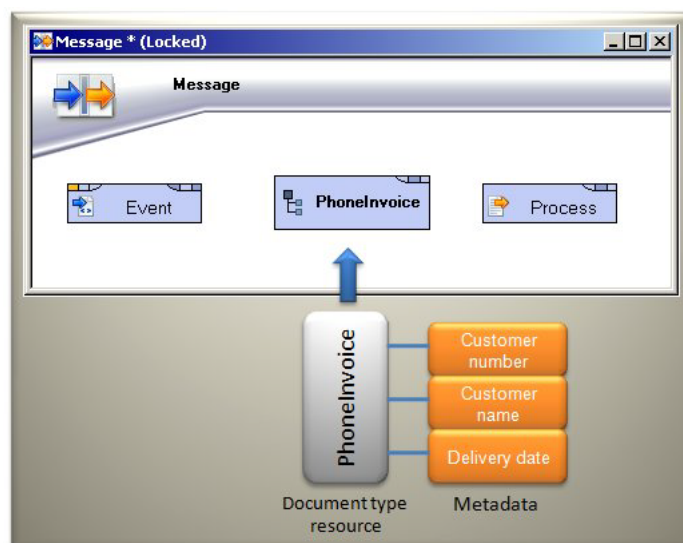


Figure 1 Connecting metadata to a Message

About document types and metadata

In this section

- [Metadata group resources](#) on page 8
- [Document type resources](#) on page 9
- [Unique document type and metadata identifiers](#) on page 13
- [Document type revisions](#) on page 13
- [Do not use more metadata than you need](#) on page 14

Metadata group resources

A metadata group resource contains a specific class of metadata. For example, a metadata group resource can contain customer related metadata, such as customer name and customer number.

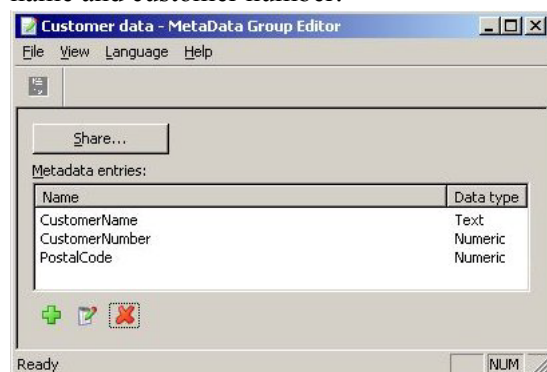


Figure 2 Metadata group with three metadata

Metadata name and type

When you add metadata to a metadata group resource you must specify the metadata name and type. The metadata name should be descriptive and unique, and the metadata type must conform to the type of data it is intended for – Numeric, Date, or Text.

Metadata values

You do not assign values to metadata in the metadata group. Metadata values are assigned per document type.

Connecting metadata to document types

When you create a metadata group resource, you must specify which document types to connect it to.

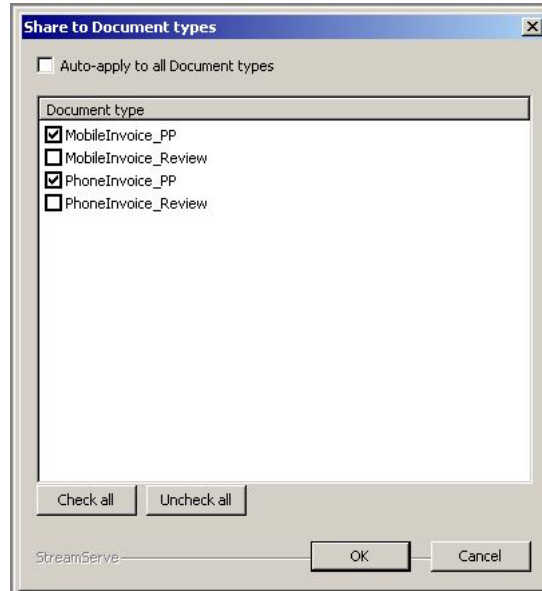


Figure 3 Metadata group connected to two document types

To enable the use of metadata in shared Composition Center resources (text and reusable rules), you must add the metadata group to all document types used in Composition Center.

Document type resources

A document type resource contains all the metadata to attach to a specific document type (invoice, order, etc.).

Metadata names and types are defined in a number of metadata groups, and each metadata group is connected to the appropriate document type resources. In each document type resource you specify the following:

- The values of the metadata when used in the document type. See [Metadata values](#) on page 9.
- In which contexts to enable metadata. See [Document type contexts](#) on page 11.

Metadata values

Metadata values are assigned per document type.

Static text or variable metadata values

You can use static text or variables as metadata values. Variable values are retrieved from Event or script defined variables. Static text values are values that you enter directly in the document type resource. Note that dollar signs (\$) cannot be used in static text values.

There is also an option to select **No value** for a metadata. This option is used with E-Invoice Center where metadata values are assigned by filters.

Note: The values must conform to the data type specified for the metadata in the metadata group resource, i.e. Numeric, Date, or Text.

Using data type Date

Date values must follow the ISO 8601 standard. Local time with offset to UTC (Coordinated Universal Time) is not supported. Examples of ISO 8601 date values are shown in the table below.

Calendar date	YYYY-MM-DD For example: 2010-05-20 You can use the <i>IsDate</i> and <i>Dformat</i> scripting functions to validate and format the value.
Date and time	YYYY-MM-DDThh:mm:ss For example: 2010-05-20T13:04:25 You can use the <i>DtisoFormat</i> scripting function to validate and format the value.

Using data type Numeric

The following apply to numeric values:

- Period must be used as decimal separator.
- The maximum number of decimal digits that can be used to the left of the decimal separator is 15.
- The maximum number of decimal digits that can be used to the right of the decimal separator is 8.
- The maximum number of decimal digits that can be used in total, to both the left and the right of the decimal separator, is 15.

You can use the *IsNum* scripting function to validate numeric values.

Using data type Text

Text values can contain any alphanumeric character.

Different metadata values in different document types

If several document types use the same metadata group, you can assign different metadata values in the document types.

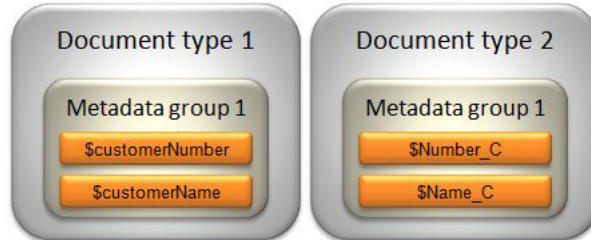


Figure 4 Document types with different values in shared “Metadata group 1”

Document type contexts

Document types can be used in different contexts:

- Archive context
- Message context
- Post-processing context

You must specify which metadata to enable and use in each context.

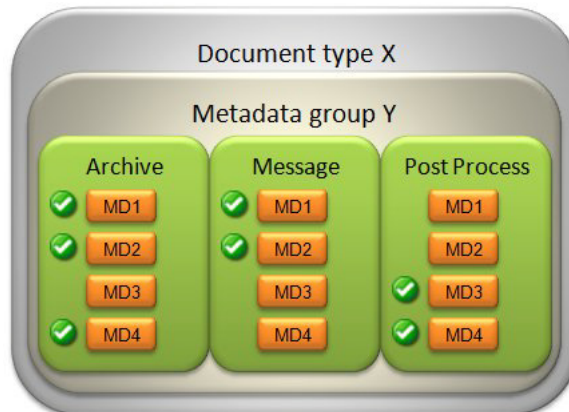


Figure 5 Metadata (MD1, MD2, etc.) enabled in different contexts

Archive context

In Archive context you specify which metadata to store in the StreamServe archive, and to use in StreamStudio Collector to search for documents in the StreamServe archive.

In this context, you also have the option to store the following predefined system metadata:

External Job ID	This metadata must be set by the SetExt.JobId scripting function. It can be used to identify documents related to specific input jobs.
------------------------	--

Receiver	This metadata is set in the runtime output connector settings in Design Center. It can be used to identify documents related to a specific receiver.
Sender	This metadata is set in the runtime job settings in Design Center. It can be used to identify documents related to a specific sender.
Expiring date time	Date and time the document expires, and is ready to be removed from the archive.
Tracker ID	The globally unique identifier (GUID) of the top job.
Application domain ID	Implemented for future use and not used in this release.

Message context

In Message context you specify which metadata to store in Message storages in the runtime repository. This metadata can be used by Correspondence Reviewer and other web services that use the WSDocument API:s.

In this context, you also have the option to store the predefined system metadata **External Job ID**.

Post-processing context

In Post-processing context you specify which metadata to store in Post-processing storages in the runtime repository. The metadata can be used when post-processing documents (enveloping and sorting).

In this context, you also have the option to store the predefined system metadata **External Job ID**.

Unique document type and metadata identifiers

Document types, metadata groups, and metadata are identified by Globally Unique Identifiers (GUIDs), and not by names, in the repositories. This ensures that all document types etc. in the repositories will have unique identifiers.

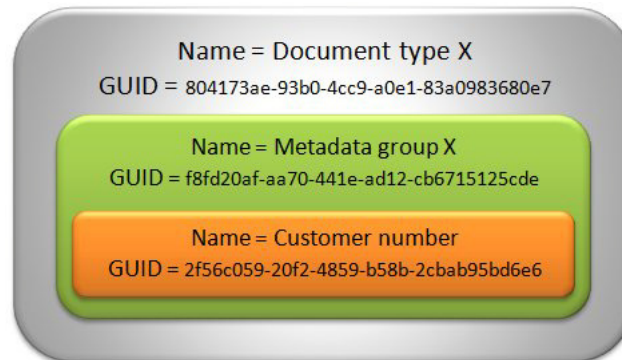


Figure 6 GUIDs for document type (Document Type X), Metadata group (Metadata group X), and metadata (Customer number)

If you, for example, delete a metadata, and then create a new metadata with the same name, the new metadata will get a different GUID than the old metadata – even though the name is the same. This will most likely cause problems when you redeploy your Project.

For information on how to display the GUIDs in Design Center, see [Metadata Group Editor](#) on page 53 and [Document Type Editor – overview](#) on page 56.



You must never copy document type or metadata group resource files (*.dcrs). If you do so, the GUIDs are copied and the identifiers are no longer unique.

Document type revisions

When you change the information in a document type, for example add new metadata, the document type revision number is increased.

When you deploy a Project that contains an updated document type, Control Center generates a warning. In this warning you can see the difference between the current document type in the enterprise repository and the document type you intend to deploy. You can then decide whether to continue to deploy the Project or cancel. If you deploy, the enterprise repository is updated with the new revision of the document type.

If you change the information in a document type resource in a global resource set, all Design Center Projects that contain the updated document type are affected. This means you must check out the latest revision of the document type before you deploy a Project. If you try to deploy a Project where the document type has a lower document revision than the document type stored in the enterprise repository, deployment fails.

Do not use more metadata than you need

To save space in the repositories, and to improve search performance, you should not use more metadata than you really need. The maximum limit is 750 metadata per document type.

Deployed document types and metadata

Document types and metadata are configured in Design Center as described in the previous sections. When a Project is exported and deployed to a StreamServer application, all document types are stored the enterprise repository.

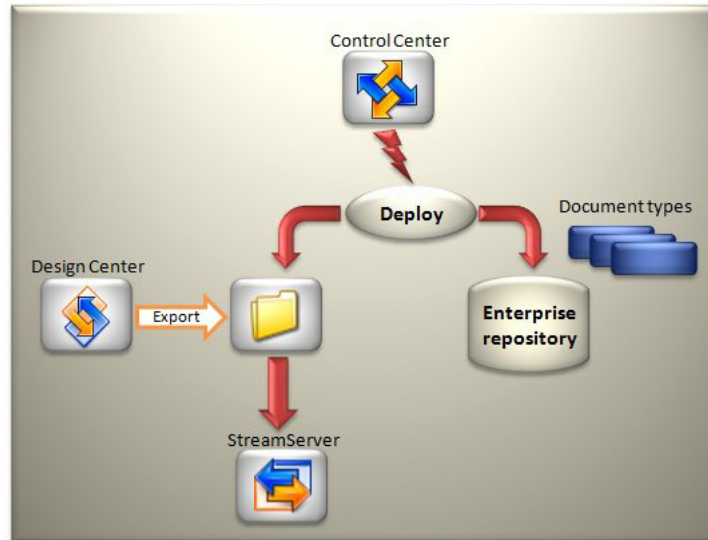


Figure 7 Document types added to enterprise repository

A schematic example of a document type stored in the enterprise repository is illustrated below.

```
<?xml version="1.0"?>
<documentType ... name="doctypeInvoice" guid="..." revision="2">
  <metadataGroup name="STATIC" guid="STATIC">
    <metadataTypes>
      <metadata name="..." scope="..." type="..." guid="..."
        archived="false" message="false" default="true" postprocess="false"/>
      ...
    </metadataTypes>
  </metadataGroup>
  <metadataGroup name="Customer Data" guid="...">
    <metadataTypes>
      <metadata name="Customer Number" scope="" type="xs:double" guid="..."
        archived="true" message="false" default="true" postprocess="false"/>
      <metadata name="Customer Name" scope="" type="xs:string" guid="..."
        archived="true" message="false" default="true" postprocess="false"/>
    </metadataTypes>
  </metadataGroup>
</documentType>
```

The document types stored in the enterprise repository are the “master document types” that determine which document type and metadata information to store in the runtime repositories and StreamServe archives.

When deploying, the document type information in the exported Project is checked against the document type information stored in the enterprise repository. If any document types are modified before the export, a warning is issued before the document types are updated in the enterprise repository.

Document types in runtime repositories

StreamStudio applications, other web services, and Post-processors use the document types and metadata in the runtime repository. All document types and metadata are retrieved from the enterprise repository, and stored in the runtime repository when the StreamServer application is started.

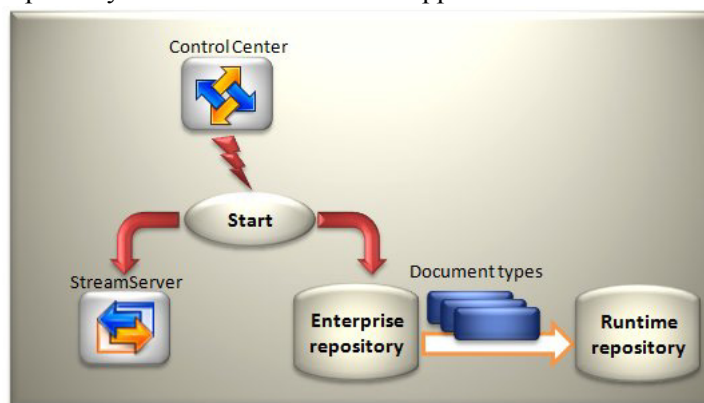


Figure 8 Document types added to runtime repository

If new document type and metadata information is added to the enterprise repository, the corresponding information is added to the runtime repository when the StreamServer application is started. If existing metadata is updated in the enterprise repository, the corresponding information is updated in the runtime repository when the StreamServer application is started.

Document types in StreamServe archives

StreamStudio Collector uses document types and metadata definitions in a StreamServe archive when searching for documents stored in the same StreamServe archive. All document types and metadata are retrieved from the enterprise repository, and stored in the StreamServe archive when the Archiver application is started.

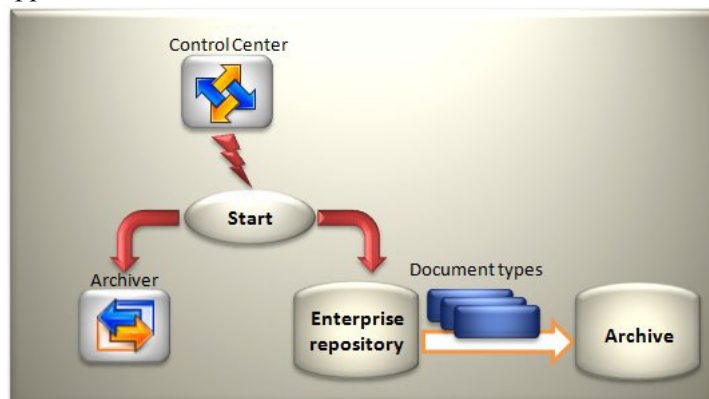


Figure 9 Document types added to StreamServe archive

If new document type and metadata information is added to the enterprise repository, the corresponding information is added to the StreamServe archive when the Archiver application is started. If existing metadata is updated in the enterprise repository, the corresponding information is updated in the StreamServe archive when the Archiver application is started.

Creating document types and metadata groups

To be able to attach metadata to documents processed by StreamServer, you must create metadata group resources and document type resources. You add metadata to the metadata groups, and connect the appropriate metadata groups to the document type resources.

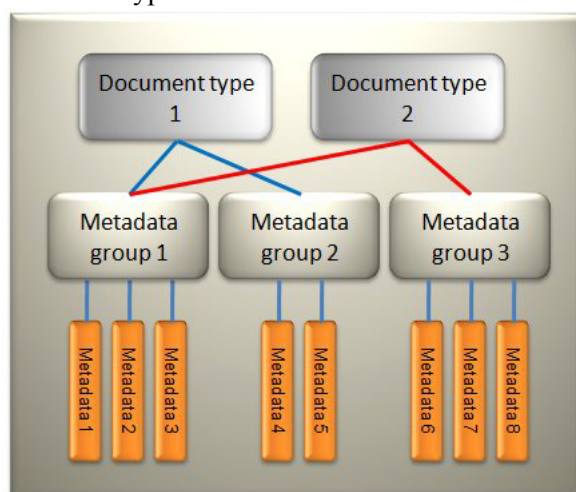


Figure 10 Metadata, metadata groups, and document types

Do not use more metadata than you need

To save space in the databases, and improve search performance, you should not use more metadata than you really need. The maximum limit is 750 metadata per document type.

Global resource set

You must create a global resource set for all document types and metadata groups used within an organization. This ensures that all document types, metadata groups, and metadata are unique.

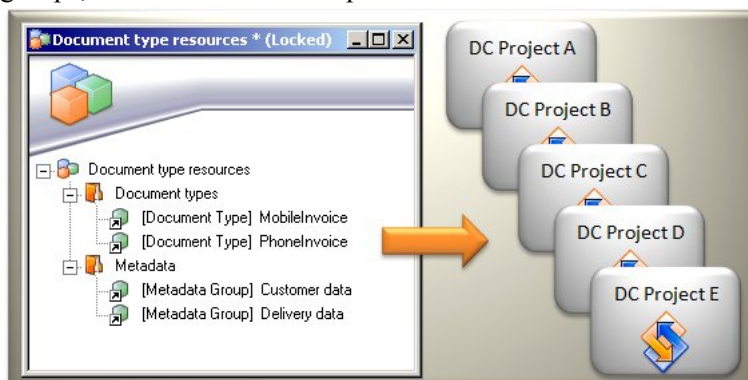


Figure 11 Global resource set used by all Design Center Projects

To create a global resource set, you can create a separate Design Center Project, and create the global resource set in this Project. You then add the global resource set to all your Design Center Projects. In each Project, you connect the document type resources to the appropriate Message configurations and Runtime configurations. For example, connect an Invoice document type resource to a Message configuration that produces invoices, and an Order document type resource to a Message configuration that produces orders.

To add a global resource set to a Design Center Project

- 1 In Design Center, select **File > Add to Project**. The Add to Project dialog box opens.
- 2 Click **Browse**. A file browser opens.
- 3 Browse to and select the global resource set. The global resource set is added to your Project.

To connect the global resource set to a Message/Runtime configuration

- 1 Right-click the Message/Runtime configuration view and select **Add Resource Set**. The Select Resource Sets dialog box opens.
- 2 Select the global resource set and click **OK**. The global resource set is connected to the Message/Runtime configuration.

Configuration procedures

- 1 Create document type resources. See [Creating document type resources](#) on page 21.
- 2 Create metadata group resources. See [Creating metadata group resources](#) on page 22.
- 3 Add metadata to the metadata group resources. See [Adding metadata to a metadata group](#) on page 22.
- 4 Connect metadata group resources to document type resources. See [Adding metadata to document types](#) on page 24.
- 5 Assign values to metadata (configured per document type resource). See [Assigning values to metadata](#) on page 25.
- 6 Enable/disable metadata in different contexts (configured per document type resource). See [Enabling metadata in different contexts](#) on page 25.
- 7 Connect document type resources to documents. See [Connecting document type resources to documents](#) on page 26.

Creating document type resources

When you create the global resource set for document type resources and metadata group resources you can start with the document type resources. At this stage, you can only create empty document type resources since there is no metadata defined. Later, when you have created metadata groups and connected the metadata groups to the appropriate document type resources, you can:

- Assign values to the metadata (see [Assigning values to metadata](#) on page 25).
- Specify in which contexts to enable metadata (see [Enabling metadata in different contexts](#) on page 25).



You must never copy document type resource files (*.dcrs). If you do so, the GUIDs are copied and the identifiers are no longer unique.

Names for document type resources

- Document type names must be unique.
- Document type names should be descriptive.
- Do not include white space in document type names.
- For information about the maximum number of characters and invalid characters in document type names, see [Naming Project components](#) in the *Design Center* documentation.

To create a document type resource

- 1 In the resource set, right-click the appropriate node and select **New > Document Type**. A new document type is added to the resource set.
- 2 Rename the document type.

Creating metadata group resources

You can create metadata group resources where you include specific classes of metadata. For example, create a metadata group resource that contains customer metadata such as customer name and customer number, create another metadata group resource that contains company metadata, and so on. First you create the metadata group resource. Then you add the metadata to the metadata group (see [Adding metadata to a metadata group](#) on page 22), and connect the metadata group to the appropriate document type resources (see [Adding metadata to document types](#) on page 24).



You must never copy metadata group resource files (*.dcrs). If you do so, the GUIDs are copied and the identifiers are no longer unique.

Names for metadata groups

For information about the maximum number of characters and invalid characters in metadata group names, see [Naming Project components](#) in the *Design Center* documentation.

Note: For readability reasons in Composition Center, names should be shorter than 20 characters.

To create a metadata group

- 1 In the resource set, right-click the appropriate node and select **New > Metadata Group**. A new metadata group is added to the resource set.
- 2 Rename the metadata group.

Adding metadata to a metadata group

When you have created a metadata group resource you can add metadata to it. When you add metadata you only specify the name and data type of the metadata – metadata values are assigned per document type (see [Assigning values to metadata](#) on page 25).

Do not add too much metadata to a metadata group

You should try to create small metadata groups containing only metadata relevant to all the document types that share the metadata group.

If you add a large number of metadata to a metadata group, irrelevant metadata might be connected to some of the document types that share the same metadata group.


Names for metadata

- Metadata names should be globally unique. This means you should not use the same metadata name for metadata in different metadata groups.
- Metadata names should be descriptive since they are displayed to business users in StreamStudio.
- For readability reasons in Composition Center, names should be shorter than 20 characters.

Data types

You must select the appropriate data type – Date, Numeric, or Text – when you add a metadata. The data type must conform to the type of data the metadata is intended for.

To add a metadata to a metadata group

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click . The Metadata definition dialog box opens.
- 3 Add a unique and descriptive **Metadata name**.
- 4 Select the appropriate **Data type** and click **OK**.

Adding metadata to document types

When you create a metadata group resource, you must specify which document type resources to connect the metadata group to.

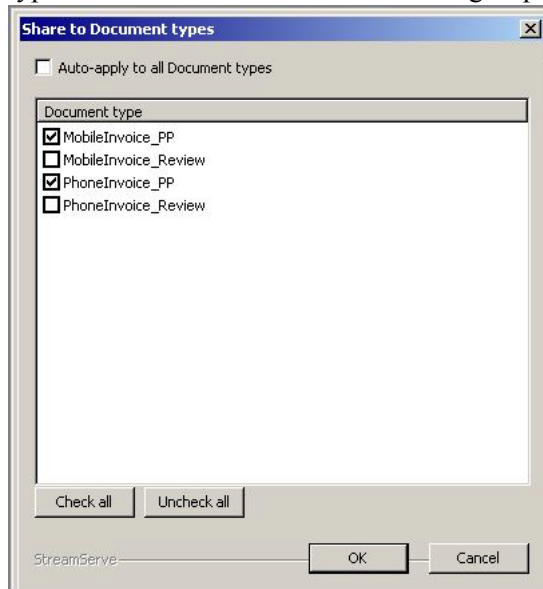


Figure 12 Connecting a metadata group to two document types

You can manually select one or more existing document type resources in the same resource set as the metadata group. You can also select the option **Auto-apply to all Document types** to connect the metadata group to all document type resources in the resource set. By selecting this option, the metadata group is automatically connected to each new document type you create in the resource set.

To connect a metadata group to existing document types

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click **Share**. The Document types view opens.
- 3 In the **Document type** list, select all document types to connect the metadata group to.
- 4 Click **OK**.

To connect a metadata group to existing and future document types

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click **Share**. The Document types view opens.
- 3 Select **Auto-apply to all Document types** and click **OK**.

Enabling metadata in reusable Composition Center resources

If metadata in a metadata group will be used in reusable Composition Center resources (text and rules), you must connect the metadata group to all document types used in Composition Center. In this circumstance it is recommended to select the option **Auto-apply to all Document types** when you connect the metadata group to document type resources.

Assigning values to metadata

Metadata values are assigned per document type. This means you can assign different values to metadata in the document types that share the same metadata group. See [Metadata values](#) on page 9 for more information about metadata values.

To assign values to metadata

- 1 In the resource set, double-click the document type. The Document Type editor opens.
- 2 In the **Metadata groups** list, select the metadata group to configure.
- 3 In the **Value assignments** table, select the first metadata to assign a value to.
- 4 Select whether to use **No value**, **Static text**, or **Variable**.
- 5 Enter the **Value**.

Enabling metadata in different contexts

A document type is divided into different contexts (see [Document type contexts](#) on page 11). You must specify which metadata to enable in each context.

To enable metadata in a context

- 1 In the resource set, double-click the document type. The Document Type editor opens.
- 2 In the **Metadata groups** list, select the metadata group to configure. All metadata in the group is displayed in the Value assignments table.
- 3 From the **Context** drop-down list, select the context (**Archive**, **Message**, or **Post-processing**).
- 4 In the **Value assignments** table, select all the metadata to enable.

Connecting document type resources to documents

You must connect document type resources to the appropriate objects in your Design Center Projects. Document types used in Archive context or Post-processing context must be connected to an output connector (in runtime configuration). Document types used in any other context must be connected to a Message.

To connect a document type resource to a Message

- 1 Right-click the Message configuration view and select **Set Document Type**. The resource browser opens.
- 2 Browse to and double-click the document type you want to connect. The document type resource is connected.

To connect a document type resource – Archive context

- 1 In the Runtime configuration view, open the output connector settings dialog box (generic layer).
- 2 Depending on the output mode, select either **Process Begin**, **Document Begin**, or **Job Begin**.
- 3 Click the **Archiving** tab.
- 4 Browse to and double-click the document type you want to connect. The document type resource is connected.

To connect a document type resource – Post-processing context

- 1 In the Runtime configuration view, open the output connector settings dialog box (generic layer).
- 2 Select **Document Begin**.
- 3 Click the **Document Type** tab.
- 4 Browse to and double-click the document type you want to connect. The document type resource is connected.

Modifying metadata groups and document types

As long as no document type is deployed to the enterprise repository, you can modify the metadata groups and document type resources at any time.

If you modify a document type after it has been deployed – this also applies to modifying any of the metadata groups included – the repositories are affected by the changes. This means the applications that use the document type information in the repositories may be affected by the changes. See [Consequences of redeploying modified document types](#) on page 35 for more information.

In this chapter

- [Modifying metadata groups](#) on page 27
- [Modifying document type resources](#) on page 32
- [Consequences of redeploying modified document types](#) on page 35

Modifying metadata groups

In this section

- [Renaming metadata groups](#) on page 27
- [Adding new metadata](#) on page 28
- [Renaming metadata](#) on page 28
- [Changing the data type of metadata](#) on page 29
- [Deleting metadata](#) on page 29
- [Deleting metadata groups](#) on page 30
- [Removing a metadata group from document type resources](#) on page 31

Renaming metadata groups

When you rename a metadata group (see [Names for metadata groups](#) on page 22 for valid names), all connected document type resources are updated with the new metadata group name.



Right-click the metadata group resource and select **Show Dependencies** to see a list of all connected document type resources.

To rename a metadata group

- 1 In the resource set, right-click the metadata group and select **Rename**.
- 2 Enter the new name and press ENTER.

Consequences for deployed document types


See [Renaming metadata groups \(redeploy\)](#) on page 36.

Adding new metadata

When you add new metadata to a metadata group, the new metadata is added to all connected document type resources when you save the metadata group.

The new metadata have no values assigned in the document type resources, which means you must assign metadata values in all affected document types. See [Editing metadata values](#) on page 32.

To add a metadata to a metadata group

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click . The Metadata definition dialog box opens.
- 3 Add a unique and descriptive **Metadata name**.
- 4 Select the appropriate **Data type** and click **OK**.

Consequences for deployed document types

See [Adding new metadata \(redeploy\)](#) on page 37.

Renaming metadata

When you rename metadata (see [Names for metadata](#) on page 23 for valid names) in a metadata group, the new metadata names are updated in all connected document type resources when you save the metadata group.

Note: If you have used the metadata names in scripts, rule functions, etc., you must update the changed metadata names in the scripts, etc.

To rename metadata

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Double-click the metadata. The Metadata definition dialog box opens.
- 3 Change the **Metadata name** and click **OK**.

Consequences for deployed document types

See [Renaming metadata \(redeploy\)](#) on page 38.

Changing the data type of metadata

You can change the type of a metadata as long as you have not deployed any document type that contains the metadata.

When you save a metadata group, the metadata types are automatically updated in all connected document type resources. The metadata values in the document type resources are not affected.

To change the data type of a metadata

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Double-click the metadata to edit. The Metadata definition dialog box opens.
- 3 Change the **Data type** and click **OK**.

Consequences for deployed document types




This change cannot be applied to a document type unless a user with administrator privileges updates the repositories. See:

- [Changes that require database manipulation](#) on page 44.
- [Changing the data type of metadata \(redeploy\)](#) on page 45.

Deleting metadata

You can delete metadata in a metadata group as long as you have not deployed any document type that contains the metadata group. When you save the metadata group, the deleted metadata is removed from all connected document type resources.

To delete a metadata

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Select the metadata to delete and click . An alert message pops up.
- 3 Click **Yes** to delete.

Consequences for deployed document types



This change cannot be applied to a document type unless a user with administrator privileges updates the repositories. See:

- [Changes that require database manipulation](#) on page 44.
 - [Deleting metadata \(redeploy\)](#) on page 46.
-

Deleting metadata groups

If you delete a metadata group, i.e. remove it from the resource set, it is removed from all connected document type resources. This means all metadata in the deleted metadata group is removed from all document types that were connected to this metadata group.

To delete a metadata group

In the resource set, right-click the metadata group and select **Delete**. The metadata group is removed from the resource set and all connected document type resources.

Consequences for deployed document types



This change cannot be applied to a document type unless a user with administrator privileges updates the repositories. See:

- [Changes that require database manipulation](#) on page 44.
 - [Deleting metadata groups \(redeploy\)](#) on page 48.
-

Adding a metadata group to document type resources

If you need more metadata in a document type, you must add the metadata groups that contain this metadata.

To add a metadata group to a document type resource

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click **Share**. The Document types view opens.
- 3 In the **Document type** list, select the document type and click **OK**.

Consequences for deployed document types

See [Adding metadata groups \(redeploy\)](#) on page 40.

Removing a metadata group from document type resources

If you want to remove unused metadata from a document type resource, you must remove the metadata groups that contain this metadata.

Note: If you remove a metadata group from a document type, you remove all metadata included in the metadata group.

To remove a metadata group from a document type resource

- 1 In the resource set, double-click the metadata group. The Metadata group editor opens.
- 2 Click **Share**. The Document types view opens.
- 3 In the **Document type** list, clear the document type and click **OK**.

Consequences for deployed document types



This change cannot be applied to a document type unless a user with administrator privileges updates the repositories. See:

- [Changes that require database manipulation](#) on page 44.
 - [Removing metadata groups \(redploy\)](#) on page 48.
-

Modifying document type resources

In this section

- [Renaming document type resources](#) on page 32
- [Editing metadata values](#) on page 32
- [Enabling/disabling metadata in a context](#) on page 33
- [Deleting document type resources](#) on page 34

Renaming document type resources

When you rename a document type resource, all affected Message configurations and Runtime configurations are updated with the new document type name.

To rename a document type resource

- 1 In the resource set, right-click the document type resource and select **Rename**.
- 2 Enter the new name (see [Names for document type resources](#) on page 21) and press ENTER.
- 3 Reload the document type resource in the Design Center objects where it is used. See [Connecting document type resources to documents](#) on page 26.



Right-click the renamed document type resource and select **Show Dependencies** to see where the resource is used.

Note: You must check the dependencies in each Design Center Project and not in the Project containing the global resource set for the document type resources.

Consequences for deployed document types

See [Renaming document type resources \(redploy\)](#) on page 39.

Note: When you deploy after renaming a document type resource, you must make sure the option **Clear data folder on deploy** is enabled. This will clear all data in the `...\applications\<Application_Name>\data` folder.

Editing metadata values

You can change the value assignment type (**No value**, **Static text**, or **Variable**) as well as the actual value assigned to the metadata. The changes you apply to a single document type do not affect any other document types.

To change a metadata value

- 1** In the resource set, double-click the document type resource. The document type editor opens.
- 2** In the **Metadata groups** list, select the metadata group that contains the metadata you want to edit.
- 3** In the **Value assignments** table, select the metadata.
- 4** Select whether to use **No value**, **Static text**, or **Variable**.
- 5** Enter the **Value**.

Consequences for deployed document types

You can change the value assignment type (**No value**, **Static text**, or **Variable**) as well as the actual value to assign to the metadata without affecting the repositories or StreamStudio applications.

Enabling/disabling metadata in a context

You can enable metadata in a context, i.e. change the metadata context in a document type from disabled to enabled. You can also disable metadata in a context (i.e. change from enabled to disabled) as long as you have not deployed the document type.

To enable/disable a metadata in a context

- 1** In the resource set, double-click the document type resource. The document type editor opens.
- 2** In the **Metadata groups** list, select the metadata group that contains the metadata.
- 3** From the **Context** drop-down list, select the context.
- 4** In the **Value assignments** table, enable/disable the metadata.

Consequences for deployed document types (enabling)

You can enable metadata in a context. See [Enabling metadata in a context \(redeploy\)](#) on page 41.

Consequences for deployed document types (disabling)



You cannot disable metadata in a context unless a user with administrator privileges updates the repositories. See:

- [Changes that require database manipulation](#) on page 44.
 - [Disabling metadata in a context \(redeploy\)](#) on page 49.
-

Deleting document type resources

If you delete a document type resource, i.e. remove it from the resource set, it is removed from all Message configurations. If the document type also is used for post-processing or archiving, it is removed from the runtime output connector configuration. This means you must assign new document type resources to the Message and runtime output connector configurations

To delete a document type resource

In the resource set, right-click the document type resource and select **Delete**. The document type is removed from the resource set and all affected Message configurations and runtime output connector configurations.

Consequences for deployed document types

See [Deleting document type resources \(redeploy\)](#) on page 42.

Consequences of redeploying modified document types

You must be aware of the consequences when you modify and redeploy a document type. This section describes different scenarios and what the consequences are.

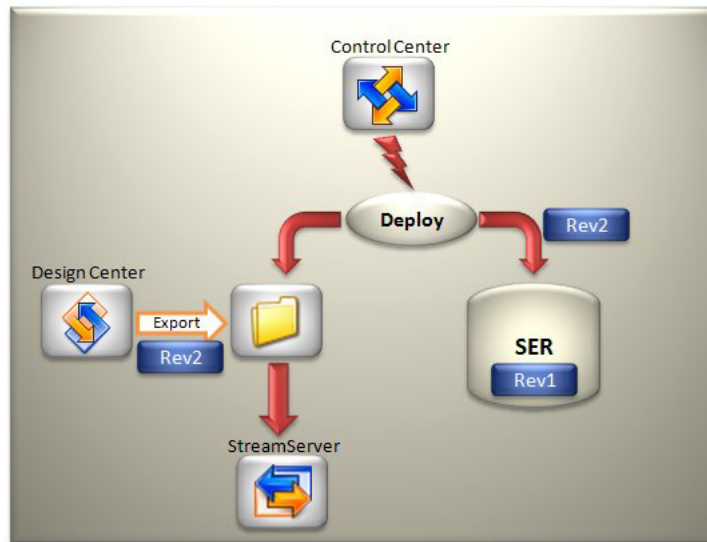


Figure 13 Redeploying a modified document type

When deployment is not allowed

In the following situations, a document type cannot be redeployed unless data is updated in the repositories by a user with special privileges:

- When the metadata type is changed.
- When metadata is removed:
 - Metadata deleted (removed from metadata group).
 - Metadata groups removed from a document type.
 - Metadata group deleted (removed from the resource set).
- When metadata is disabled in a context.

In this section

- [Renaming metadata groups \(redeploy\)](#) on page 36
- [Adding new metadata \(redeploy\)](#) on page 37
- [Renaming metadata \(redeploy\)](#) on page 38
- [Renaming document type resources \(redeploy\)](#) on page 39
- [Adding metadata groups \(redeploy\)](#) on page 40
- [Changing metadata values \(redeploy\)](#) on page 41
- [Enabling metadata in a context \(redeploy\)](#) on page 41

Modifying metadata groups and document types

- [Enabling metadata in a context \(redeploy\)](#) on page 41
- [Deleting document type resources \(redeploy\)](#) on page 42
- [Changes that require database manipulation](#) on page 44

Renaming metadata groups (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	The following changes are applied to document types that include the renamed metadata group: <ul style="list-style-type: none">• The revision number is updated.• The metadata group name is changed.
Runtime repository	Metadata groups are not represented in the runtime repository.
StreamServe archive	Metadata groups are not represented in the StreamServe archive.

Consequences in StreamStudio

Application	Consequences
Composer	Metadata groups are not displayed in Composer.
Composition Center	The metadata group name is changed in Composition Center. Since only the name of the metadata group has changed, all included metadata remain unchanged in Composition Center.
Collector	Metadata groups are not shown in Collector. This means Collector is not affected when you rename a metadata group.

Adding new metadata (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	<p>The following changes are applied to document types that include the metadata group with the new metadata:</p> <ul style="list-style-type: none"> • The revision number is updated. • The new metadata is added.
Runtime repository	<p>The new metadata is added to the runtime repository.</p> <p>Message storages New metadata is added to a Message storage if:</p> <ul style="list-style-type: none"> • The document type of the Message storage includes the new metadata. • The metadata is Message context enabled in the document type. <p>Post-processing storages New metadata is added to a Post-processing storage if:</p> <ul style="list-style-type: none"> • The document type of the Post-processing storage includes the new metadata. • The metadata is Post-processing context enabled in the document type.
StreamServe archive	<p>The new metadata is added to the StreamServe archive if it is Archive context enabled in the document type.</p>

Consequences in StreamStudio

Application	Consequences
Composer	The new metadata is available in Composer.
Composition Center	The new metadata is available in Composition Center.
Collector	<p>The new metadata is available in Collector if it is Archive context enabled in the document type.</p> <p>The new metadata can only be used for documents that are archived after the metadata was added to the StreamServe archive.</p>

Renaming metadata (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	<p>The following changes are applied to document types that include the metadata group with the renamed metadata:</p> <ul style="list-style-type: none"> • The revision number is updated. • The metadata name is changed.
Runtime repository	<p>The metadata name is updated in the runtime repository.</p> <p>Message storages The metadata name is updated in the Message storages.</p> <p>Post-processing storages The metadata name is updated in the Post-processing storages.</p>
StreamServe archive	The metadata name is updated in the StreamServe archive.

Consequences in StreamStudio

Application	Consequences
Composer	<ul style="list-style-type: none"> • The metadata name is changed in the selection lists in Composer. • The metadata name is not changed in already defined texts. This means these texts must be manually updated with the new metadata names.
Composition Center	<ul style="list-style-type: none"> • The metadata name is changed in the selection lists in Composition Center. • The metadata name is changed in already defined texts and rules.
Collector	The metadata name is changed in all sections in Collector. The name change does not affect Collector searches. This means you can use the new name to search for documents that were stored in the StreamServe archive before and after the metadata was renamed.

Renaming document type resources (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	<ul style="list-style-type: none"> The revision number is updated for the document type. The document type is renamed.
Runtime repository	<p>The document type name is updated in the runtime repository.</p> <p>Message storages The name of the Message storage is changed.</p> <p>Post-processing storages The name of the Post-processing storage is changed.</p>
StreamServe archive	The document type name is updated in the StreamServe archive.

Consequences in StreamStudio

Application	Consequences
Composer	<ul style="list-style-type: none"> The document type name is updated in Composer. Since only the name of the document type is changed, all metadata connected to the document type remain unchanged in Composer.
Composition Center	Since only the name of the document type is changed, all metadata connected to the document type remain unchanged in Composition Center.
Collector	The document type name is updated in Collector. The name change does not affect Collector searches. This means you can use the new name to search for documents that were stored in the StreamServe archive before and after the metadata was renamed.

Adding metadata groups (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	<ul style="list-style-type: none"> The revision number is updated for the affected document types. The new metadata group is added to the affected document types. All metadata in the new metadata group are added to the affected document types.
Runtime repository	<p>All metadata in the new metadata group is added to the runtime repository.</p> <p>Message storages Metadata in the new metadata group is added to a Message storage if:</p> <ul style="list-style-type: none"> The document type of the Message storage includes the new metadata group. The metadata is Message context enabled in the document type. <p>Post-processing storages Metadata in the new metadata group is added to a Post-processing storage if:</p> <ul style="list-style-type: none"> The document type of the Post-processing storage includes the new metadata group. The metadata is Post-processing context enabled in the document type.
StreamServe archive	<p>All Archive context enabled metadata in the new metadata group is added to the StreamServe archive.</p>

Consequences in StreamStudio

Application	Consequences
Composer	All metadata in the new metadata group is available in Composer.
Composition Center	All metadata in the new metadata group is available in Composition Center.
Collector	<p>The new metadata is available in Collector if it is Archive context enabled in the document type.</p> <p>The new metadata can only be used for documents that are archived after the metadata was added to the StreamServe archive.</p>

Changing metadata values (redeploy)

You can change the value assignment type (**No value**, **Static text**, or **Variable**) as well as the actual value to assign to the metadata without affecting the repositories or StreamStudio applications.

Enabling metadata in a context (redeploy)

Consequences in databases

Database	Consequences
Enterprise repository	<ul style="list-style-type: none"> The revision number is updated for the document types that include the new metadata group. The metadata value for the context in the document type xml is changed to <code>true</code>.
Runtime repository	<p>Message storages All metadata enabled in Message context is added to the Message storage.</p> <p>Post-processing storages All metadata enabled in Post-processing context is added to the Post-processing storage.</p>
StreamServe archive	All metadata enabled in Archive context is added to the StreamServe archive.

Consequences in StreamStudio

Application	Consequences
Composer	There are no consequences for Composer since you cannot enable/disable metadata in this context.
Composition Center	There are no consequences for Composition Center since you cannot enable/disable metadata in this context.
Collector	All metadata enabled in Archive context is available in Collector. This metadata can only be used for documents that are archived after the metadata were enabled.

Deleting document type resources (redploy)

Consequences in databases

Database	Consequences
Enterprise repository	The document type is not removed from the enterprise repository. See Deleting document types in enterprise and runtime repository on page 43.
Runtime repository	<p>The document type is not removed from the runtime repository. See Deleting document types in enterprise and runtime repository on page 43.</p> <p>Message storages The Message storage for this document type is not removed from the runtime repository. To remove it from the runtime repository you must drop the storage using Database Administration Tool (DBAT).</p> <p>Post-processing storages The Post-processing storage for this document type is not removed from the runtime repository. To remove it from the runtime repository you must drop the storage using Database Administration Tool (DBAT).</p>
StreamServe archive	The document type is not removed from the StreamServe archive. To remove it you must use your DBMS.

Consequences in StreamStudio

Application	Consequences
Composer	<p>If you delete a document type, it is removed from all related Message configurations. To enable this type of Message configuration in Composer you must assign a new document type to it.</p> <p>Metadata used in texts and rules in Composer are connected to the deleted document type. This means you must update all texts and rules that include metadata from the deleted document type, and use metadata from the new document type instead.</p>
Composition Center	<p>If you delete a document type, it is removed from all related Message configurations. To enable this type of Message configuration in Composition Center you must assign a new document type to it.</p> <p>Templates affected by the change of document type need new document definitions in Composition Center.</p>

Application	Consequences
Collector	<p>If you delete a document type, it is removed from all related Message configurations. To enable this type of Message configuration in Collector you must assign a new document type to it.</p> <p>Documents archived before the change of document type are searched for using the old document type. Documents archived after the change are searched for using the new document type.</p>

Deleting document types in enterprise and runtime repository

If you delete a document type resource, it is not deleted from the enterprise repository or runtime repository after Project export and deployment. To delete a document type from the repositories, you must delete it manually, for example from Control Center. Note that you delete the document type from the enterprise repository and runtime repository at the same time.

Note: You must have administrator privileges to delete document types.

Before deleting a document type from the repositories

Before you can delete a document type from the runtime repository, you must:

- Stop all applications in the application domain.
- Make sure the runtime repository contains no jobs related to the document type. You can use Database Administration Tool to delete jobs.
- Make sure the runtime repository contains no Messages in Message storages related to the document type. You can use Database Administration Tool to expire and delete Messages.
- Make sure the runtime repository contains no documents in Post-processing storages related to the document type. You can use Database Administration Tool to expire and delete documents.
- Make sure the runtime repository does not contain any persistent resources related to the document type. You can use Database Administration Tool to delete the resources.
- Make sure there are no documents, related to the document type, waiting to be archived. You can use Database Administration Tool to examine the archiving queue, and to retry to archive documents that failed to be archived.
- Make sure the runtime repository does not contain any saved Collector searches related to the document type. You can use Database Administration Tool to delete the saved searches.
- Make sure you have a complete backup of the runtime repository.

To delete a document type from the repositories

- 1 In Control Center, right-click the **Site** node and select **Document Types**. The Document Types dialog box opens.

- 2 Select the document type you want to delete and click **Delete**.

Message and Post-processing storages

Message and Post-processing storages related to the deleted document type are also removed from the runtime repository when you delete the document type.

Changes that require database manipulation

The following changes cannot be applied to a document type unless a user with administrator privileges updates the repositories:

- Change the data type of metadata. See *Changing the data type of metadata (redeploy)* on page 45.
- Remove metadata:
 - Metadata deleted (removed from metadata group). See *Deleting metadata (redeploy)* on page 46.
 - Metadata groups removed from a document type. See *Removing metadata groups (redeploy)* on page 48.
 - Metadata group deleted (removed from the resource set). See *Deleting metadata groups (redeploy)* on page 48.
- Disable metadata in a context. See *Disabling metadata in a context (redeploy)* on page 49.

Forcing updates into the runtime repository

If any of the changes described above must be applied to a document type, then a user with administrator privileges can force the updates into the runtime repository. See *Forcing updates into the runtime repository* on page 51.

Changing the data type of metadata (redeploy)

Before you redeploy, you must:

- Stop all applications in the application domain.
- Make sure the runtime repository contains no jobs related to affected document types. You can use Database Administration Tool to delete jobs.
- Make sure the runtime repository contains no Messages in Message storages affected by the changed metadata. You can use Database Administration Tool to expire and delete Messages (do not drop Message storage).
- Make sure the runtime repository contains no documents in Post-processing storages affected by the changed metadata. You can use Database Administration Tool to expire and delete documents (do not drop Post-processing storage).
- Make sure the runtime repository does not contain any persistent resources related to affected document types. You can use Database Administration Tool to delete the resources.
- Make sure there are no documents waiting to be archived. You can use Database Administration Tool to examine the archiving queue, and to retry to archive documents that failed to be archived.
- Make sure there are no saved Collector searches that include the changed metadata. If there are, you must remove the changed metadata from all affected searches in Collector.
- Make sure you have a complete backup of the runtime repository.

When you try to redeploy, you receive a message saying you cannot redeploy unless you force the update into the runtime repository. To do this you must have administrator privileges. See [Forcing updates into the runtime repository](#) on page 51.

Consequences in databases

Database	Consequences
Enterprise repository	<p>The following changes are applied to document types that include the metadata group with the deleted metadata:</p> <ul style="list-style-type: none"> • The revision number is updated. • The metadata type is removed.
Runtime repository	<p>The metadata type is updated in the runtime repository.</p> <p>Message storages The metadata type is updated in all Message storages.</p> <p>Post-processing storages The metadata type is updated in all Post-processing storages.</p>
StreamServe archive	<p>The old metadata is not removed from the StreamServe archive. It is still attached to already archived documents, but it cannot be used anymore in Collector searches.</p>

Consequences in StreamStudio

Application	Consequences
Composer	<p>The metadata cannot be used in already defined texts. This means these texts must be manually updated.</p>
Composition Center	<p>The metadata cannot be used in already defined texts and rules. This means these texts and rules must be manually updated.</p>
Collector	<p>The metadata cannot be used in Collector searches.</p>

Deleting metadata (redeploy)

Before you redeploy, you must:

- Stop all applications in the application domain.
- Make sure the runtime repository contains no jobs related to affected document types. You can use Database Administration Tool to delete jobs.
- Make sure the runtime repository contains no Messages in Message storages affected by the changed metadata. You can use Database Administration Tool to expire and delete Messages.
- Make sure the runtime repository contains no documents in Post-processing storages affected by the changed metadata. You can use Database Administration Tool to expire and delete documents.
- Make sure the runtime repository does not contain any persistent resources related to affected document types. You can use Database Administration Tool to delete the resources.

- Make sure there are no documents waiting to be archived. You can use Database Administration Tool to examine the archiving queue, and to retry to archive documents that failed to be archived.
- Make sure there are no saved Collector searches that include the deleted metadata. If there are, you must remove the metadata from all affected searches in Collector.
- Make sure you have a complete backup of the runtime repository.

When you try to redeploy, you receive a message saying you cannot redeploy unless you force the update into the runtime repository. To do this you must have administrator privileges. See [Forcing updates into the runtime repository](#) on page 51.

Consequences in databases

Database	Consequences
Enterprise repository	<p>The following changes are applied to document types that include the metadata group with the deleted metadata:</p> <ul style="list-style-type: none"> • The revision number is updated. • The metadata is removed.
Runtime repository	<p>The metadata is removed from the runtime repository.</p> <p>Message storages The metadata is removed from all Message storages and cannot be used anymore.</p> <p>Post-processing storages The metadata is removed from all Post-processing storages and cannot be used anymore.</p>
StreamServe archive	<p>The deleted metadata is not removed from the StreamServe archive. It is still attached to already archived documents, but it cannot be used anymore in Collector searches.</p>

Consequences in StreamStudio

Application	Consequences
Composer	<ul style="list-style-type: none"> • The metadata is removed from the selection lists in Composer. • The metadata cannot be used in already defined texts. This means these texts must be manually updated.
Composition Center	<ul style="list-style-type: none"> • The metadata is removed from the selection lists in Composition Center. • The metadata cannot be used in already defined texts and rules. This means these texts and rules must be manually updated.
Collector	<p>The deleted metadata cannot be used in Collector searches.</p>

Removing metadata groups (redploy)

This has exactly the same impact as deleting metadata. See [Deleting metadata \(redploy\)](#) on page 46.

Deleting metadata groups (redploy)

This has exactly the same impact as deleting metadata. See [Deleting metadata \(redploy\)](#) on page 46.

Disabling metadata in a context (redeploy)

Before you redeploy, you must:

- Stop all applications in the application domain.
- Make sure the runtime repository contains no jobs related to affected document types. You can use Database Administration Tool to delete jobs.
- If you disable metadata in Message context, make sure the runtime repository contains no Messages in Message storages affected by the changed metadata. You can use Database Administration Tool to expire and delete Messages.
- If you disable metadata in Post-processing context, make sure the runtime repository contains no documents in Post-processing storages affected by the changed metadata. You can use Database Administration Tool to expire and delete documents.
- If you disable metadata in Archive context, make sure there are no documents waiting to be archived. You can use Database Administration Tool to examine the archiving queue, and to retry to archive documents that failed to be archived.
- Make sure the runtime repository does not contain any persistent resources related to affected document types. You can use Database Administration Tool to delete the resources.
- If you disable metadata in Archive context, make sure there are no saved Collector searches that include the changed metadata. If there are, you must remove the changed metadata from all affected searches in Collector.
- Make sure you have a complete backup of the runtime repository.

When you try to redeploy, you receive a message saying you cannot redeploy unless you force the update into the runtime repository. To do this you must have administrator privileges. See [Forcing updates into the runtime repository](#) on page 51.

Modifying metadata groups and document types**Consequences in databases**

Database	Consequences
Enterprise repository	<ul style="list-style-type: none"> The revision number is updated for the document types that include the disabled metadata. The metadata value for the context in the document type XML is changed to <code>false</code>.
Runtime repository	<p>Message storages Metadata disabled in Message context can no longer be used.</p> <p>Post-processing storages Metadata disabled in Post-processing context can no longer be used.</p>
StreamServe archive	Metadata disabled in Archive context is not removed from the StreamServe archive. It is still attached to already archived documents, but it cannot be used anymore in Collector searches.

Consequences in StreamStudio

Application	Consequences
Composer	There are no consequences for Composer since you cannot enable/disable metadata in this context.
Composition Center	There are no consequences for Composition Center since you cannot enable/disable metadata in this context.
Collector	Metadata disabled in Archive context cannot be used in Collector searches.

Forcing updates into the runtime repository

If you have administrator privileges you can force updates into the runtime repository. This applies to the following types of changes:

- When the metadata type is changed.
- When metadata is removed:
 - Metadata deleted (removed from a metadata group).
 - Metadata groups removed from a document type.
 - Metadata group deleted (removed from the resource set).
- When metadata is disabled in a context.

If you have made any of the changes above, and try to redeploy a Project in Control Center, you receive a message saying you cannot redeploy unless you force the updates into the runtime repository. In this case you have the option to click **Cancel** and cancel the action, or **Force update** to force the updates into the runtime repository and deploy the Project. Before you force the updates into the runtime repository you must verify the following:

- There are no running applications in the application domain.
- The runtime repository contains no jobs related to affected document types.
- The runtime repository contains no Messages in Message storages affected by the change.
- The runtime repository contains no documents in Post-processing storages affected by the change.
- The runtime repository does not contain any persistent resources related to affected document types.
- There are no documents waiting to be archived if metadata is disabled in Archive context.
- The runtime repository contains no saved Collector searches affected by the change.
- You have a complete backup of the runtime repository.

GUI reference

In this chapter

- [Metadata group resource reference](#) on page 53
- [Document type resource reference](#) on page 56

Metadata group resource reference

In this section

- [Metadata Group Editor](#) on page 53
- [Metadata definition dialog box](#) on page 55

Metadata Group Editor

In the Metadata Group editor, you define which metadata to include in a metadata group. You also select the document type resources to connect the metadata group to.

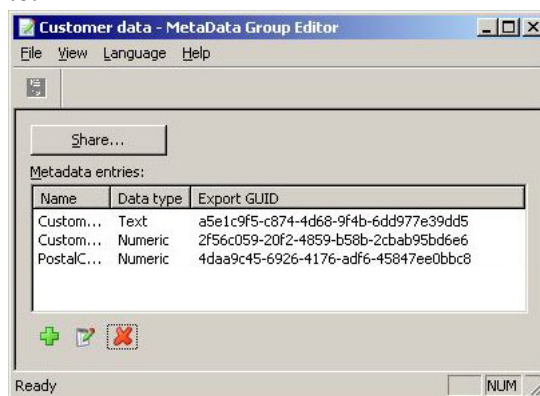





Figure 14 The MetaData Group Editor – initial view

Setting	Description
Share	Opens the Document types view where you select the document type resources to connect the metadata group to.
Name	The name of the metadata.
Data type	The data type of the metadata.

Setting	Description
Export GUID	The GUID of the metadata. Displayed only if enabled in View > Export GUIDs .
	Opens the Metadata definition dialog box where you specify the name and data type of each metadata.
	Opens the Metadata definition dialog box where you can edit the metadata settings.
	Deletes the selected metadata.

View menu commands

The View menu includes the commands described in the table below.

Command	Description
Toolbar	Enables the toolbar.
Status Bar	Enables the status bar.
Export GUIDs	Displays the metadata GUIDs in the editor.

Document types view

In this view, you select the document type resources to connect the metadata group to.

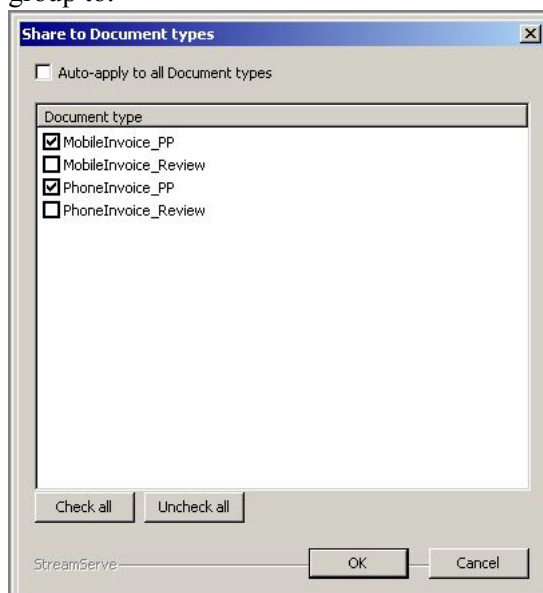


Figure 15 The MetaData Group Editor – document types view

Setting	Description
Auto-apply to all Document types	If selected, the metadata group is connected to all existing document type resources in the resource set that contains the metadata group resource. The metadata group is also automatically connected to all new document type resources created in the resource set.
Document type	Select which existing document type resources to connect the metadata group to.

Metadata definition dialog box

In the Metadata definition dialog box, you specify the name and data type of each metadata.

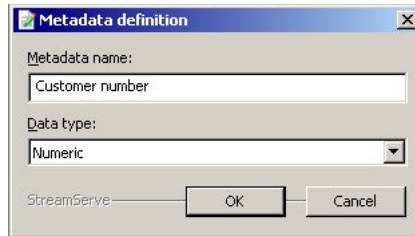


Figure 16 The Metadata definition dialog box

Setting	Description
Metadata name	The name of the metadata. <ul style="list-style-type: none"> The name must be unique. This means you must not use the same metadata name for metadata in the same or different metadata groups. The name should be descriptive since it is displayed to business users in StreamStudio.
Data type	The type of data the metadata is intended for. You must select the appropriate data type – Date , Numeric , or Text .

Document type resource reference

In this section

- [Document Type Editor – overview](#) on page 56
- [Document Type Editor – metadata values](#) on page 58
- [Document Type Editor – contexts](#) on page 59
- [Document Type Editor – sample files](#) on page 61

Document Type Editor – overview

In the Document Type Editor, you assign values to metadata, and specify in which contexts to use the metadata.

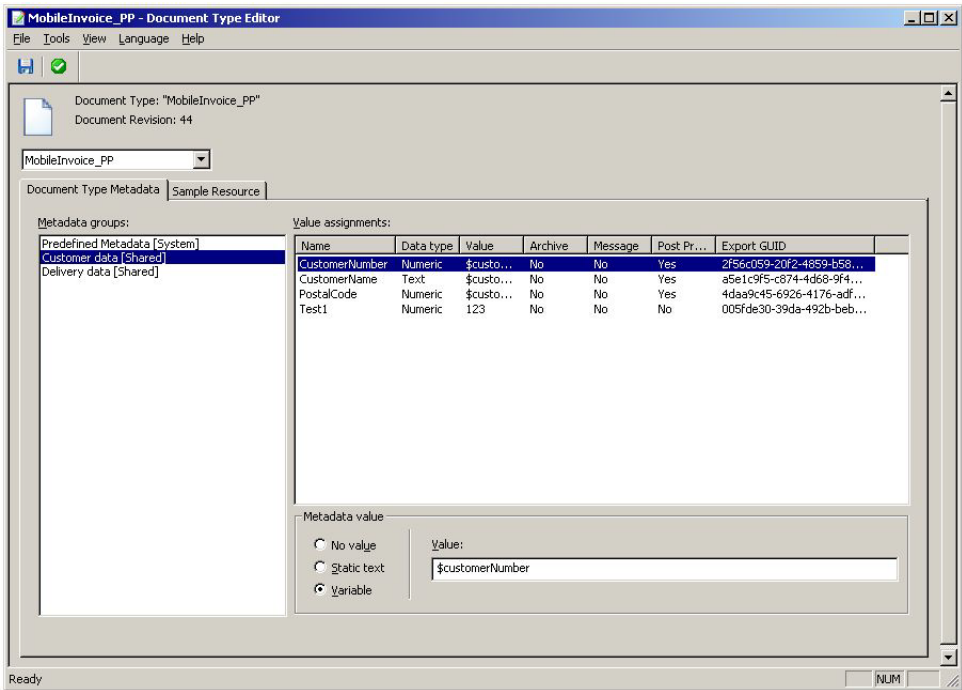




Figure 17 Document type editor

Settings	Description
Context drop-down list	Selects context to display. See Document type contexts on page 11.
Metadata groups	All metadata groups added to the document type.

Settings	Description
	Displays document type information: <ul style="list-style-type: none">• Document type name.• Document type revision.• Document type GUID (if enabled in View > Export GUIDs).
	Validates metadata. Checks if metadata with identical names is assigned to the document type.

Value assignments table

See [Document Type Editor – metadata values](#) on page 58 and [Document Type Editor – contexts](#) on page 59.

Metadata value section

See [Document Type Editor – metadata values](#) on page 58.

Tools menu commands

The Tools menu includes the commands described in the table below.

Command	Description
Validate Metadata	Checks if metadata with identical names are assigned to the document type.

View menu commands

The View menu includes the commands described in the table below.

Command	Description
Toolbar	Enables the toolbar.
Status Bar	Enables the status bar.
Export GUIDs	Displays the document type and metadata GUIDs in the editor.

Document Type Metadata tab

On this tab you assign values to the metadata (see [Document Type Editor – metadata values](#) on page 58) and specify the context settings for the metadata (see [Document Type Editor – contexts](#) on page 59).

Sample Resource tab

On this tab you assign sample files to the document type. The sample data in the files is used when previewing documents in StreamStudio. See [Document Type Editor – sample files](#) on page 61.

Document Type Editor – metadata values

On the Document Type Metadata tab, when the top node in the context drop-down list is selected, you can assign values to the metadata added to the document type. First you must select a metadata group to display its metadata. Then you select metadata and specify the metadata values.

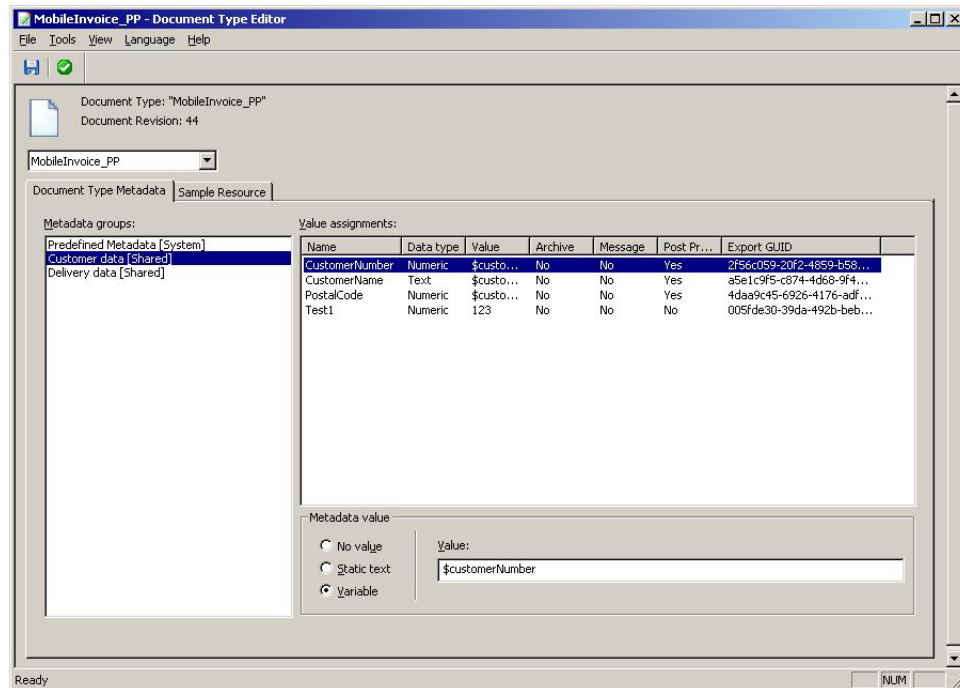


Figure 18 Document type editor – metadata assignment settings

Value assignments table

This table displays the values assigned to the metadata in the selected metadata group.

Column	Description
Name	The name assigned to the metadata.
Data type	The data type assigned to the metadata.
Value	The value of the metadata. The value is assigned per document type (see Metadata value section below).
Archive	Shows whether the metadata is enabled in the Archive context. This is defined per document type.
Message	Shows whether the metadata is enabled in the Message context. This is defined per document type.
Post-processing	Shows whether the metadata is enabled in the Post-processing context. This is defined per document type.

Column	Description
Export GUID	The GUID of the metadata (if enabled in View > Export GUIDs).

Metadata value section

In this section you assign the value to the metadata selected in the Value assignments table. See [Metadata values](#) on page 9 for information about valid values.

Setting	Description
No value	Used with E-Invoice Center where metadata values are assigned by filters.
Static text	Used when the metadata has a fixed value.
Variable	Used when the metadata value is assigned by a variable.
Value	The value to assign to the metadata (static text or variable).

Document Type Editor – contexts

On the Document Type Metadata tab, you can specify whether to include metadata in different contexts.

A document type is divided into different contexts (see [Document type contexts](#) on page 11). For each context you must specify which metadata in the document type resource to use.

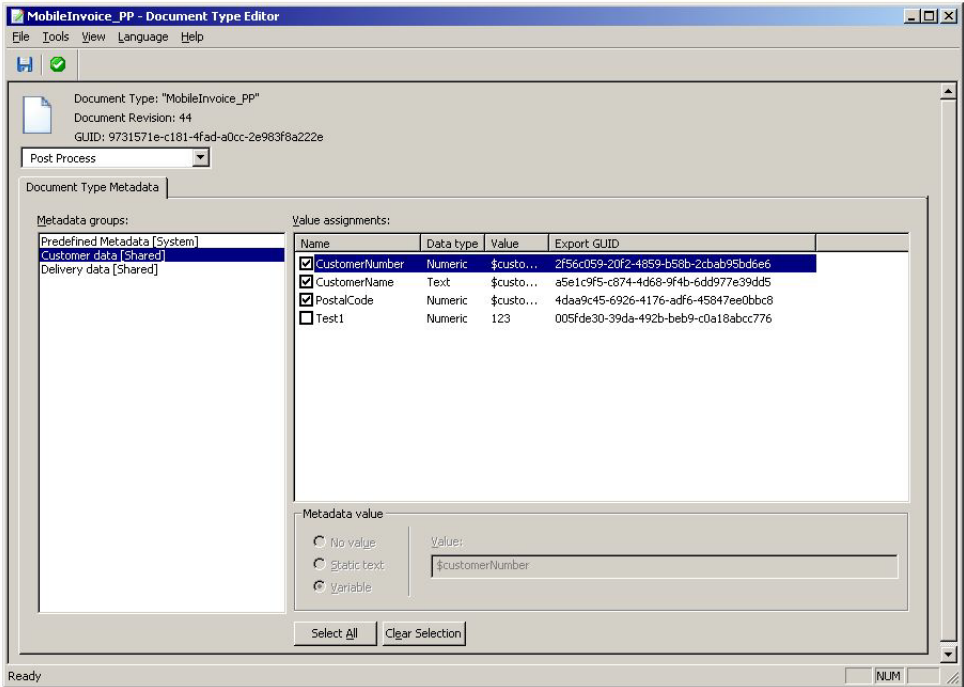


Figure 19 Document type editor – metadata context settings

Setting	Description
Context drop-down list	Selects the context to display and edit. See Document type contexts on page 11.
Value assignments table	Enables/disables metadata in the selected metadata group and context.
Select All	Enables all metadata in the selected metadata group and context.
Clear Selection	Disables all metadata in the selected metadata group and context.

Document Type Editor – sample files

On the Sample Resource tab, you assign sample files to the document type. The sample data in the files is used when previewing documents in StreamStudio.

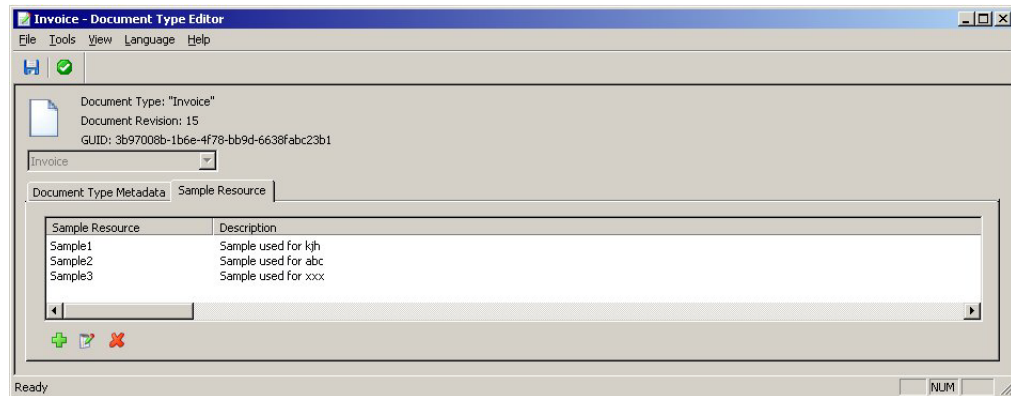





Figure 20 Document type editor – sample resource settings

Icon	Description
	Adds a new sample file to document type.
	Edit the selected sample file. You can select a new sample file and edit the description.
	Deletes the selected sample file.

