



# Metadata Management CMS Extension

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## Document History

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## Metadata Management CMS Extension Overview

The CrownPeak CMS provides robust content authoring and editing tools allowing the capture of content and data of any type.

A common request or question is whether the CrownPeak CMS provides any Tagging or Meta Data capabilities, and the answer is absolutely yes. The CrownPeak CMS offers built-in tagging capabilities that can be applied on any type of assets, including Binary assets. This capability is built into the new Digital Asset Management offering, and is described in detail in Digital Asset Management Playbook.

This document describes a CMS extension offering a framework to define custom tagging and meta data configurations that be applied to templates to Tag CMS assets at the template level.

CrownPeak subscribers should consider leveraging this CMS extension to take advantage of the following capabilities:

- Define tags as per business requirements
- Configure CMS templates to enable tagging of assets using a number of different authoring controls
- Relate Assets via applied tags
- Use the tags with CrownPeak Search for highly dynamic and interactive web experiences

## Benefits of Metadata Management

The Metadata Management Extension extends the native authoring capabilities of the CrownPeak CMS with the following:

- Ability to define Tags and organize them by categories
- Ability to apply Tags to assets by configuring the input template with the following controls:
  - Drop-down: allowing a single tag selection
  - Checkboxes: allowing multiple tag selections
  - Radio buttons: allowing a single tag selection
  - Multi Select: allowing multiple tag selections
- Ability to relate tagged assets
- Ability to publish the tags and asset references as xml for CrownPeak Search to consume, providing highly dynamic and interactive web experiences
- Custom or advanced Metadata configurations can be made based on customer business requirements

## Business Process guides the configuration of Metadata Management

The Metadata Management extension can be configured to support many business processes. Before starting the configuration, it is beneficial to solidify the scope of the configuration. Use this list to determine how the customer is going to use Metadata Management in their instance.

1. Does the customer want to tag their content?
2. Does the customer want to relate content?
3. Are the tags organized in categories?
4. Are the tags hierarchical?
5. Will the tags be imported from or exported to external systems?
6. What type of content or documents will need to be tagged?

## Configuring Metadata Management

Once the Business Process is understood, configuring Metadata Management is done as follows:

### Setup and Installation

Metadata Management, like other CMS Extensions, is a collection of best practices, library methods, templates, models, assets that together provide the overall framework necessary to enable the management of Tags in the CMS.

The framework is typically setup and installed by CrownPeak Support and Expert Services.

Once the necessary underlying framework is setup and configured, the next steps are:

- Defining the site Tags
- Configuring the Tagging authoring experience in the appropriate templates.

### Defining Site Tags

The default Metadata Management installation requires an `_Tags` folder to be located in the site root folder. This folder will include a Tag model to create and define tags.

Create a new Tag: *New > Tag*

Type	Label	Changed By	Changed On
File	Products	Tim Griffiths	12/10/12 5:31:17 AM
File	Pension	Fahd Shaaban	11/19/12 9:55:27 PM
File	Mutual Funds	Fahd Shaaban	11/19/12 9:55:27 PM
File	Investment	Fahd Shaaban	11/19/12 9:55:27 PM
File	Annuities	Fahd Shaaban	11/19/12 9:55:27 PM
File	401K	Fahd Shaaban	11/19/12 9:55:26 PM

Provide Tag details: *Enter a tag label*

AdventGeneral > \_Tags > Tag

Current Asset (Draft) ▾

**Tag Details**

**Tag**

Tag

Tags can be defined in folders reflecting categories to organize the tags.

## Template Configuration

Configuring Metadata Management within templates is accomplished by calling any one of the many library methods the Metadata framework provides.

## Input Template

The Metadata library method call is as follows:

```
MDMInput.ShowTagInput(<type>, <location>, <name>);
```

Where

**Type** is one of the following options: *radio, checkbox, drop-down, and list*

**Location** is the location of the Tag category folder in the CMS

And **Name** is the fieldname of the captured tag(s). Multiple tags are comma delimited.

The four authoring options to apply in the Input Template are radio buttons, checkboxes, drop-down menus, and multi-select.

### Radio Buttons

Radio buttons allow for a single tag selection to be applied to an asset.

Radio buttons

### Checkboxes

Checkboxes allow for multiple tag selections to be applied to an asset.

Checkboxes

*Drop-down menus*

A Drop-down menu allows for a single tag selection to be applied to an asset.

The screenshot shows a 'Tags' section with a dark blue header containing the word 'Tags' and a 'Collapse' link. Below the header is a light gray area with the text 'Select a Tag'. A drop-down menu is open, showing a list of tag options: 'Annuities' (highlighted in blue), '401K', 'Investment', 'Mutual Funds', and 'Pension'. The current selection in the menu is 'Annuities'.

*Drop-down menu*

*Multi-Select*

A multi-select allows for multiple tag selections to be applied to an asset.

The screenshot shows a 'Tags' section with a dark blue header containing the word 'Tags' and a 'Collapse' link. Below the header is a light gray area with the text 'Select one or more tags'. There are two lists of tag options. The left list contains 'Annuities', 'Investment' (highlighted in blue), and 'Pension'. The right list contains '401K' and 'Mutual Funds'. Between the two lists are two buttons: a right-pointing arrow (>) and a left-pointing arrow (<).

*Multi-select option*

**Output Template**

The following output method will output the captured tags. This is especially useful to render the tags as metadata on the webpage, for SEO purposes.

```
MDMOutput.ShowMetaTags(asset, <location>, <name>);
```

Where:

- **Location** is the location of the Tag category folder in the CMS
- And **Name** is the fieldname of the captured tag(s). Multiple tags are comma delimited.



## Using Metadata Management

Metadata Management adheres to CrownPeak authoring and content management best practices. Defining and creating a new “Tag” is accomplished by using the Tag model found in the `_Tags` folder.

### Applying Tags to assets

Based on the Input Template configuration, a CMS author may select and apply one or more Tags from one or more tag categories.

The tags will be saved (comma delimited if more than one tag is selected per category) upon saving all the content changes to the asset.

### Finding Related Assets

The Metadata Management framework provides the following library methods to find related assets

*Find related assets to selected asset*

```
MDMOutput.FindRelatedAssets (asset, <name>, <count>, <order>);
```

*Find related assets by tag*

```
MDMOutput.FindRelatedAssets(<name>);
```

### Tags and Assets

The Metadata Management framework provides the following library methods to output all current tags with related assets

```
MDMOutput.GetTagsWithAssets(<location>);
```

## Notes and Additional Information

More information can be found in

<https://connect.crownpeak.com/blogs/developers/product-update-connectors>

### Implementation Guidelines

In general, the default installation of Metadata Management can be completed in about 4 hours.

The effort required for further customization of Metadata Management will depend on the business requirements.

### Playbook Notes

<https://connect.crownpeak.com>