



Documents: Bulk Import

Overview

Follow this guide if you wish to bulk import documents and files which are previously stored in the old intranet or cloud storage into Claromentis. Please note this task does come at a cost, which will be determined by the amount of data needing to be imported and will be discussed with your Project Manager or Account Manager.

If you host your own system this will be something you can do yourself however if your system is hosted by us (SaaS) please submit a change request for this to be arranged with our team.

Step1 - Export all of your files

The objective here is to export all of the files you wish to import to Claromentis into a directory on your computer. here are just some examples of how you can get access to the files in the cloud or any shared drive

Box - Downloading from Box

DropBox - If you are using dropbox then the copy of your files is already located within dropbox folder on your computer

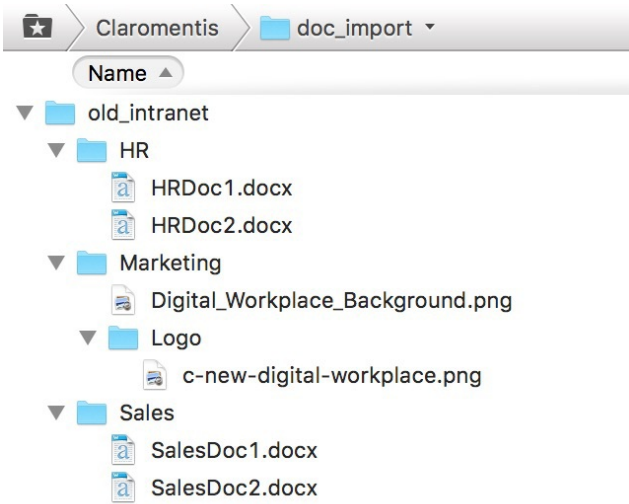
Share Point - How to export all files from sharepoint

Step 2 - Bulk Upload to Claromentis Server

Uploading via a browser may not be the most reliable way, we recommend using a dedicated program to upload the files into location on the same server as Claromentis such as SCP or FTP tools. If you need help getting your files into Claromentis Server which we hosted please raise a Change request. Please note depending on the size of the imported documents there might be additional services required.

Here is an example that I have imported the files into a location on the server

```
/Claromentis/doc_import/old_intranet
```



Step 3 - Importing Documents

Navigate to Admin > Documents > Document Import (under Utilities) and select Import document from file system

ERMS features

- Use ERMS records (ERMS_CONFIG_RECORD)
- Use ERMS markers (ERMS_CONFIG_MARKERS)
- Use record types (ERMS_CONFIG_RECORD_TYPES)
- Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
- Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)
- Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)
- Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)
- Use ERMS schedules (ERMS_CONFIG_SCHEDULE)
- Use Google drive links (ERMS_CONFIG_GDOC_LINKS)
- Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics

Number of Documents	89
Number of all versions of documents	94
Number of checked out documents	0
Total space occupied by documents	401.99 Mb
Number of deleted documents and folders	0
Size of deleted documents	0 Bytes

Documents

- Manage documents list

Utilities

- Documents import**
- Documents export
- Trash can
- Documents reports
- Documents permissions report

Configuration

- General configuration
- Metadata
- Record types
- Templates

Enter the source which is the file location on the server and set the destination folder where you wish these documents to be imported.

In the example below I have created a folder called "Old Intranet" in the Documents application and I wish to import all file types.

Source

This is the file location on your server

Destination

Filters **Date** from to

Size from Kb to Kb

File types to import

- All listed file types**
- ARJ-compressed Archive
- Microsoft Word Document
- CompuServe Bitmap Image
- Text Document
- Audio Video Interleaved
- Music sample
- RAR-compressed Archive
- Microsoft Excel Document
- JPEG Image
- XML (Extensible Markup Language)
- MPEG Video
- All other types**
- ZIP-compressed Archive
- HTML (HyperText Markup Language)
- Windows Bitmap Image
- Adobe PDF (Portable Document Format)
- QuickTime Movie

Alternative file types

Please separate each file type with a comma. For file types without an extension, please add a comma to the end of the list.

Additional file types

Exclude these file types

Duplicate files

Please choose an option what to do with files if file with the same name already exists in DMS

- Skip
- Overwrite
- Create version

Set the following metadata fields

- All metadata fields**
- Review Date
- Description
- Author
- Version comment
- Related Documents
- Additional notes

Set the following Record types

- All record types**

Set Folder metadata as

- All metadata fields**
- Description

Click on "Show Report" to simulate the process otherwise simply click "Continue" to proceed with the import.

On the next screen click "Import" to proceed - depending on the size this may take a while.

Once complete you will see a report from the system, click "Finish".

Source /Claromentis/doc_import/old_intranet

Destination Old Intranet

Free space on destination 132.91 Gb

Type	Amount	Duplicates	Errors	Total size
docx	4	0	0	83.62 Kb
png	2	0	0	397.25 Kb
Total	6	0	0	480.87 Kb

Folders

Import more **Finish**

Step 4 - Finish

You can now access the file and folder in the documents and set appropriate permission and metadata.

As you might notice the sub-folder structure is preserved.

Documents

Filter the current folder

Documents ▶ Old Intranet

Parent folder

HR

Marketing

Sales

Advance Import

If you need a more sophisticated import for example

- Bulk import document metadata
- Large files & directory
- Preserving older versions

Please submit a change request and we will be able to help you further.

Related Article

[Migrating Document](#)

Last modified on 30 November 2023 by Hannah Door

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Tags: bulk, documents, files, import