



## Documents: Bulk Import

### Please check the advice below before proceeding

- If your [site is self-hosted \(your team hosts the site on-premise\)](#) bulk document imports can be performed by your team following this guide. If any help is required to achieve this in a self-hosted environment, please raise a [change request](#) for our designated team to assist.
- [If your site is hosted by us \(SaaS\)](#) it is not possible to follow this guide as the import steps won't work, instead, all document imports have to be carried out by Claromentis support staff on your behalf. Please raise a [change request](#) for our designated team to assist.

### Performing a Document Import to a Self-hosted Site

Follow this guide if you wish to bulk import documents and files to your self-hosted Claromentis system.

#### Step1 - Export all of your files

The objective here is to export all 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

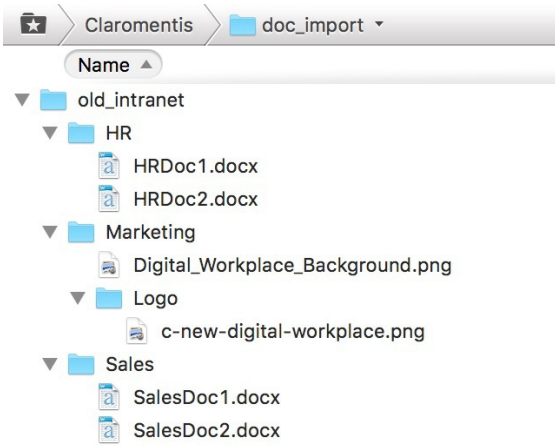
**Share Point** - [How to export all files from sharepoint](#)

#### 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 a location on the same server as Claromentis such as SCP or FTP tools.

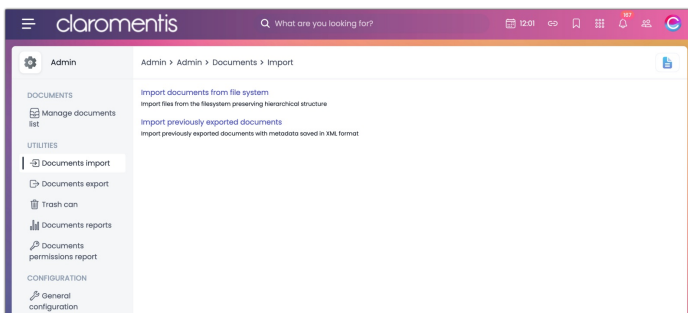
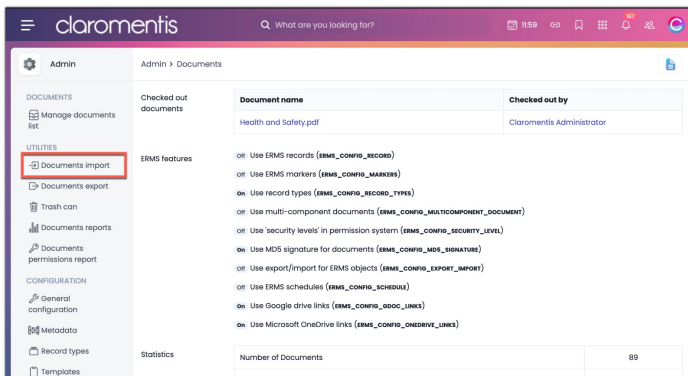
Here is an example where files have been imported into a location on the server:

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



### Step 3 - Importing Documents

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



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

In the example below a folder called 'Old Intranet' has been created in the Documents application and the types of files to be imported have been selected:

Admin > Documents > Import documents from file system

Source:

Destination:

Filters: Date from  to  Size from  Kb to  Kb

File types to import

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

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

<input type="checkbox"/> All metadata fields	<input type="checkbox"/> Author	<input type="checkbox"/> Related Documents	<input type="checkbox"/> Description
<input type="checkbox"/> Review Date			
<input type="checkbox"/> Version comment			

Set the following Record types

All record types

Set Folder metadata as

All metadata fields  
 Description

Click on 'Show Report' to simulate the process and check all is well and/or click 'Continue' to proceed with the import.

On the next screen click 'Import' to proceed - depending on the size of your import, it may take time to complete.

Once this does complete you will see a report from the system, click 'Finish'.

Admin > Documents Control Panel > Import documents from file system

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
<b>Total</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>480.87 Kb</b>

**Folders**

## Step 4 - Finish

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




Sub-folder structure is preserved.

## Documents

Filter the current folder

Documents > Old Intranet

Parent folder

 HR	 Marketing	 Sales
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## More Advanced Imports

If you need a more sophisticated import for example:

- Bulk import document metadata
- Large number of files & complex directory

- Preserving older versions of files

Please submit a [change request](#) for our designated team to assist you further.

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