



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

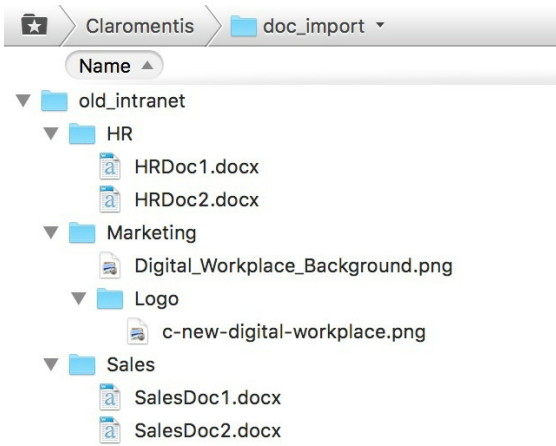
Share Point - [Exporting files from SharePoint](#)

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.

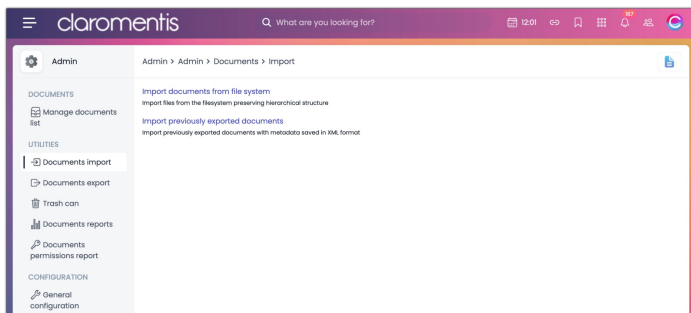
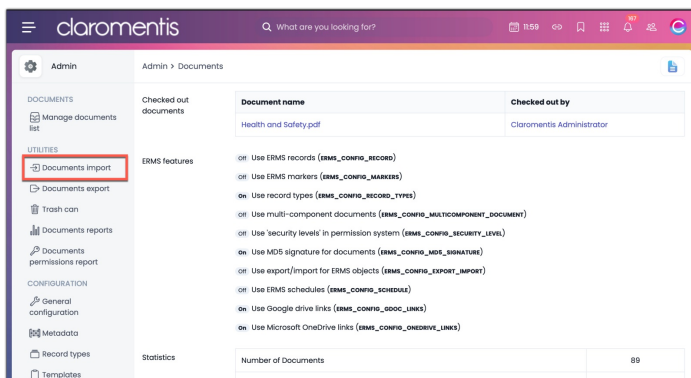
Here is an example where files have been imported into a location on the server:

```
/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 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

/Claromentis/doc_import/old_intranet

Check

This is the file location on your server

Destination

Old Intranet

Change

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

Show report

Set the following metadata fields

All metadata fields

Review Date

Version comment

Author

Related Documents

Description

Set the following record types

All record types

Set folder metadata as

All metadata fields

Description

Continue

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
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.

Sub-folder structure is preserved.

Documents

Filter the current folder

Documents

Old Intranet

Parent folder

HR

Marketing

Sales

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.

Last modified on 29 January 2025 by [Abigail Yap](#)

Created on 24 October 2024 by [Michael Christian](#)

Tags: [bulk](#), [documents](#), [files](#), [import](#)