

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

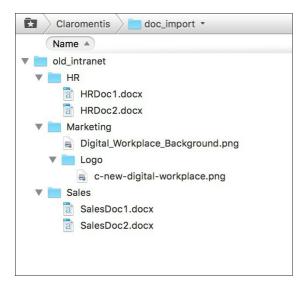
Share Point - Exporting files from SharePoint

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.

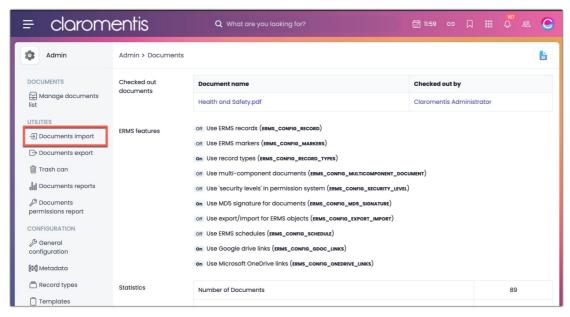
Here is an example where files have been imported into a location on the server:

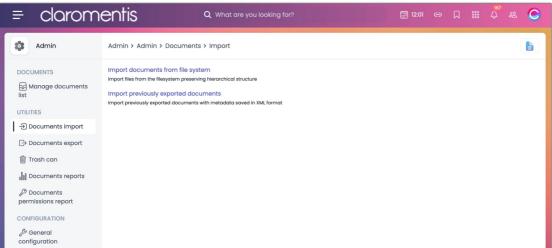
/Claromentis/doc_import/old_intranet



Step 3 - Importing Documents

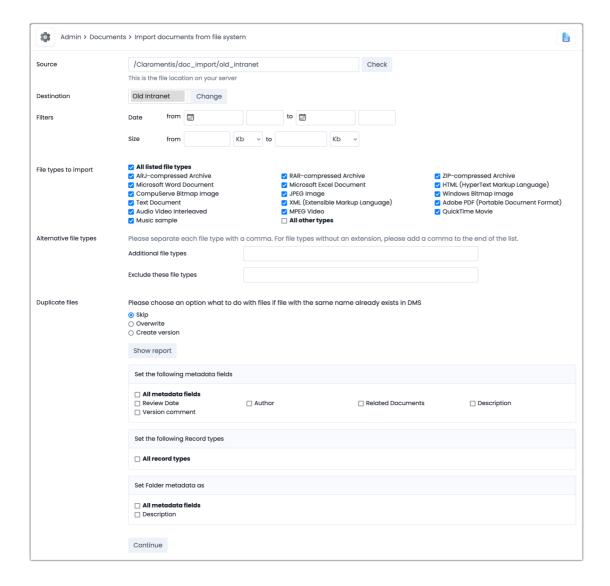
Navigate to Admin > Documents > Document Import (under Utilities) and select 'Import documents from file system'





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.

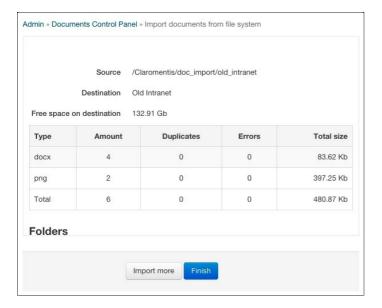
In the example below a folder called 'Old Intranet' has been created in the Documents application and the types of files to be imported have been selected:



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.

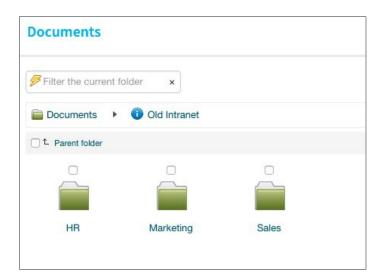
Once this does complete you will see a report from the system, click 'Finish'.



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.



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 6 November 2025 by Hannah Door

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