

Creating a Digital Marker means creating a 'marker' or an indicator in the Intranet for file locations outside Claromentis e.g. on the Internet or physical copies for Intranet users to reference.

This is useful because references to all your files can be built in one place (the Intranet) and users will know they can search this to find what they need.

The two most common use cases for Digital Markers:

1. Online File / Asset in the Cloud

Files stored in the cloud in OneDrive, DropBox etc can be referenced in the Intranet and become searchable for users to find even though the content exists outside Claromentis.

(Please note only the title and description provided will be indexed for this type of marker, only Google Drive indexes body content using the Google Drive API)

2. Physical File / Asset

A copy of a physical file may exist in a particular office and this needs to be referenced in the Intranet for users to find.

e.g. South Office, 2nd Floor, Room 21, Cabinet 214A

How to Use Digital Markers?

1. Check the feature is enabled

An application administrator of Documents on your site can check Digital Markers are enabled.

Head to Admin > Documents and confirm the setting highlighted below shows as 'on':



If this isn't enabled (shows as 'off') please raise a support ticket requesting this to be enabled and we can assist.

2. Configure the metadata required for Marker

Extra fields can be created to appear in Documents when creating a Digital Marker.

Different information may be needed for a marker that links to a file stored online in comparison to a file with a physical location.

An application administrator of Metadata can access Admin > Metadata > Marker (in documents metadata) to add the fields you require.

= claromentis	Q What are you look	ing for? 🔠 1251 G) R # 🖞 & 🧲
Admin > Metadata			
			New metadata set
Misc metadata		Documents metadata	
Name	Туре	Name	Туре
Common metadata heap	Common metadata heap	Documents	Documents
Image Gallery	Image Gallery	Folders	Folders
Image Gallery	Image Gallery	Markers	Markers
News	News	Audit	
Users	Users	Name	Туре
Idea Spaces	Discuss	No metadata sets	
Projects	Project		
Publish metadata			
Name	Type		

For assets stored online, we recommend having at least Comments and Location (URL) available for users to fill out when creating a Digital Marker:

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Admin > Metadata >	Edit metadata set										
Metadata for: Markers											
Metadata set name:	Markers		Save	Export							
Key / Order #	Title	Туре		Default value	Editable		Repec	atable			
comments	Comments	Long text			\odot					g ci	
location_url	Location (URL)	Hyperlink			Ø					g co	
Use drag-and-drop on first col					0					gc	

For physical assets, more information can be attributed e.g. Office Name, Room No, Cabinet No etc

Administrators of Metadata can create these in the Marker area as required to appear on the front end for use when creating Digital Markers.

tadata for: Markers	Markers		Save Export			
Key / Order #	Title	туре	Default value	Editable	Repeatable	
comments	Comments	Long text		0		g o
location_url	Location (URL)	Hyperlink		0		g o
office_name	Office Name	String		Ø		бo

3. Use the option to create a Marker

The feature can be used by end users from the front end of Documents (Applications > Documents > More)



Documents application administrators can create markers from the admin side (Applications > Admin > Documents > Manage Document list > Marker)

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Admin	Admin > Docume	nts > Documents list				ł
DOCUMENTS	🗎 Root / Doce	iment Library			🖹 Collapse all 🗎 Exp	and all Add a marker
UTILITIES - 된 Documents import	Select view Defe	ault - 🗹			000	3
Documents import		Name -	Size Owner	Last modified	Description	
🏦 Trash can	۵ 🛛	B Document Library	Claromentis Administrator	24-10-2024 12:32		
Documents reports	۵ D	- 🛚 🖿 Certificates	Claromentis Administrator	16-10-2023 13:07		
permissions report	0 🤌 🗆	- 🕫 💼 Demo User Documents	Claromentis Administrator	30-11-2022 21:59	Demo users can upload docun within this folder	nents
& General configuration	0 🔎 🗆	- 🗉 🖿 Human Resources	Claromentis Administrator	05-04-2022 10:55		
🖽 Metadata						

Google Drive Digital Marker Example

Documents > Docum	ent Library > Marketing > Add new Marker	
Title	June Campaign Dossier	
Tags	0	
	popular tags: intranet, claromentis, microsoft, excel, social	
Comments		
Location (URL)	/ttps://docs.google.com/document/d/_TJHm2QWMDodyb5oY0W038 Google Drive Location	
Office Name		
Description	A	

The marker will appear on the front end of documents (the icon will differ depending on the document view the user has chosen)

Documents > Document Library > Marketin	10		٢
Filter the current folder	×	 ⑦ Document ③ Folder ⋮ ⋮ □ □	
□ ∧ Parent folder			
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 ☆ & June Campaign Dossier ☆ 한 Pages or Custom VI Version 9.mp4 			
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It is now available in searches for users to find and click on to open the file in Google Drive (your team will need to ensure the user has permissions in Google Drive for the file to load successfully)

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← June Campaign Dossier ☆
Location (URL) Geogle Drive Location Overview Comments e
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Commentia Administrator on 24-10-2021 4:87
Owner
Claromentis Administrator Created on 24-10-2024 14:37
Viewed by

Created on 24 October 2024 by Hannah Door Tags: document, files, location, digital, marker