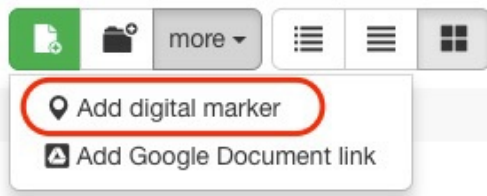




Documents: Digital Marker

What is a Digital Marker?



Digital Marker allows you to place a 'marker' or an indicator for files or physical files outside Claromentis.

There are 2 known use cases:

1. Online File / Asset in the Cloud

You may want to store a link to an asset or file that is stored elsewhere in the cloud for instance an important file that is stored in OneDrive, DropBox or any other Cloud apps and make them searchable within Claromentis.

(Please note only the title and description provided will be indexed for this type of marker, for Google Drive we do have the option to index its content using Google Drive API)

2. Physical File / Asset

A copy of a physical file or asset may exist in the office for example you may have a physical 'wallet' for case files that are stored.

South Office, 2nd Floor, Room 21, Cabinet 214A

How to Enable Digital Marker?

1. Check the configuration

Digital marker is part of ERMS (Electronic Record Management System) feature, check if it is enabled on your system by navigating to

Admin> Document Control Panel

- ERMS features
- Off Use ERMS records (ERMS_CONFIG_RECORD)
 - On Use ERMS markers (ERMS_CONFIG_MARKERS)
 - On Use record types (ERMS_CONFIG_RECORD_TYPES)
 - Off Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
 - Off Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)
 - Off Use 'custodian' in permission system (ERMS_CONFIG_PERM_CUSTODIAN)
 - On Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)
 - Off Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)
 - Off Use ERMS schedules (ERMS_CONFIG_SCHEDULE)
 - Off Use ERMS refcode for file_plan elements (ERMS_CONFIG_REFCODE)
 - On Use Google documents links (ERMS_CONFIG_GDOC_LINKS)

if it isn't enabled (OFF) please contact our support team or raise a support ticket.

2. Configure metadata required for Marker

Under Configuration, click Metadata and select "Markers" under Documents metadata.

For assets stored online we recommend having at least:

Comments and Location (URL)

For physical assets more information can be attributed:

Office Name, Room No, Cabinet No

Admin / Metadata / Edit metadata set

Metadata for: Markers

Metadata set name: [Export](#)

Key / Order #	Title	Type	Default value	Editable	Repeatable	
note	Comments	String		✓		
doc_location	Location (URL)	Hyperlink		✓		

Use drag-and-drop on first column to change order of fields

Benefits of Digital Markers

1. **Searchable** from the same search engine, it allows physical objects/assets to be searchable within Claromentis along with other digital files
2. **Context**, it is possible to place a physical or online marker in a relevant folder within the folder structure.

Last modified on 30 November 2023 by Hannah Door

Created on 24 October 2017 by Michael Christian

Tags: document, files, location, digital, marker