Documents: Digital Marker

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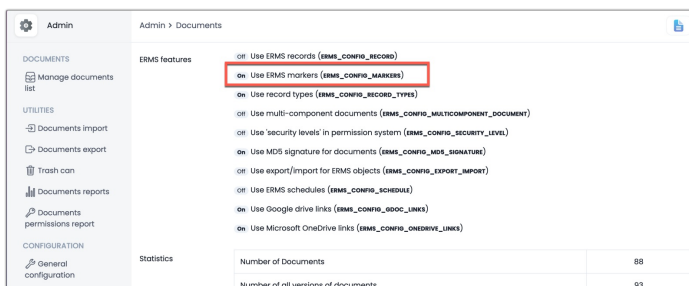
e.g. South Office, 2nd Floor, Room 21, Cabinet 214A

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 enalbed 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.
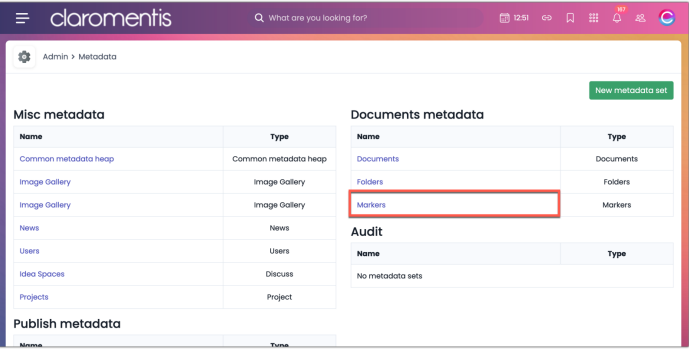

For assets stored online, we recommend having at least *Comments* and *Location (URL)* available for users to fill out when creating a Digital Marker:
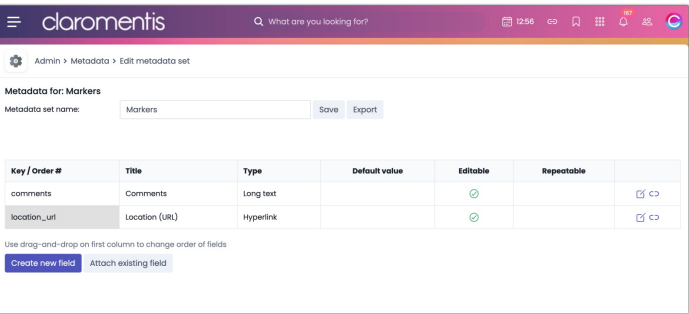

For physical assets, more information can be attributed e.g. *Office Name, Room No, Cabinet No* etc

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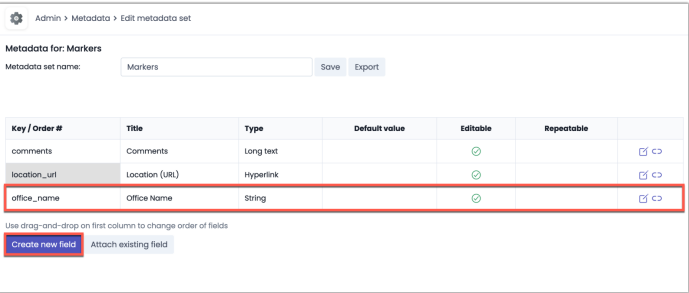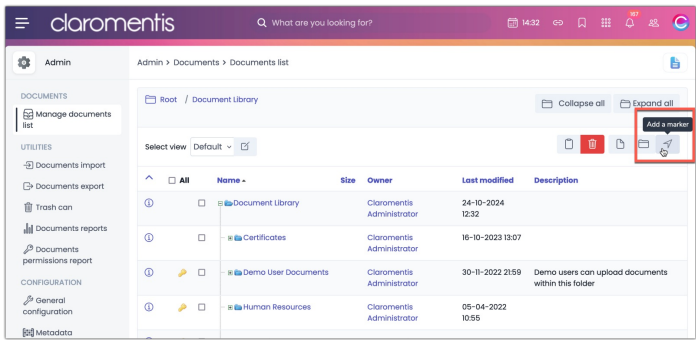

3. Use the option to create a Marker

The feature can be used by end users from the front end of Documents (Applications > Documents > More)
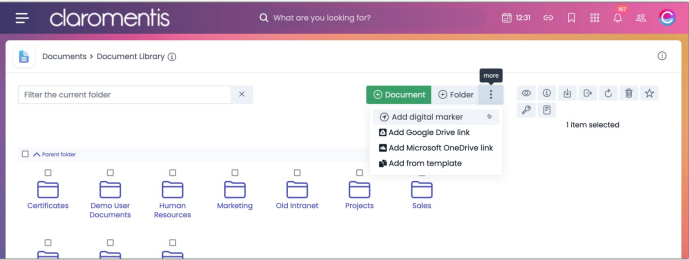
Documents application administrators can create markers from the admin side (Applications > Admin > Documents > Manage Document list > Marker)

Google Drive Digital Marker Example

The marker will appear on the front end of documents (the icon will differ depending on the document view the user has chosen)
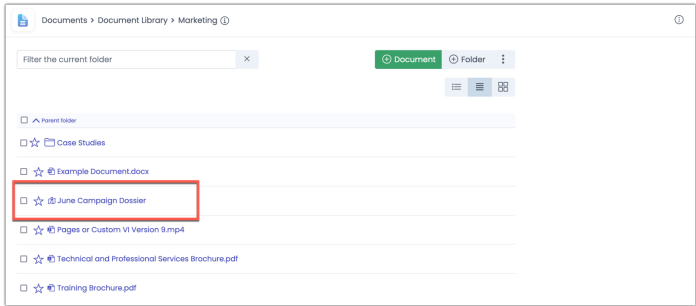
It is now available in searches for users to find and click on to open the file in Google Drive (your team will need to ensure the user has permissions in Google Drive for the file to load successfully)