



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':

Admin

Admin > Documents

DOCUMENTS

Manage documents list

UTILITIES

Documents import

Documents export

Trash can

Documents reports

Documents permissions report

CONFIGURATION

General configuration

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)

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)

On Use Google drive links (ERMS_CONFIG_GDOC_LINKS)

On Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics

Number of Documents	88
Number of all versions of documents	93

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.

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What are you looking for?

12:51

167

Admin > Metadata

New metadata set

Misc metadata

Name	Type
Common metadata heap	Common metadata heap
Image Gallery	Image Gallery
Image Gallery	Image Gallery
News	News
Users	Users
Idea Spaces	Discuss
Projects	Project

Documents metadata

Name	Type
Documents	Documents
Folders	Folders
Markers	Markers

Audit

Name	Type
No metadata sets	

Publish metadata

Name	Type
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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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What are you looking for?

12:56

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Admin > Metadata > Edit metadata set

Metadata for: Markers

Metadata set name: Markers

Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
comments	Comments	Long text		✓		🔗 ↺
location_url	Location (URL)	Hyperlink		✓		🔗 ↺

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

Create new field Attach existing field

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.

Admin > Metadata > Edit metadata set

Metadata for: Markers

Metadata set name: Save Export

Key / Order #	Title	Type	Default value	Editable	Repeatable	
comments	Comments	Long text		✓		✎ ↔
location_url	Location (URL)	Hyperlink		✓		✎ ↔
office_name	Office Name	String		✓		✎ ↔

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

Create new field

Attach existing field

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)

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What are you looking for?

12:31

167

Documents > Document Library

Filter the current folder

more

+ Document

+ Folder

⋮

➕ Add digital marker

➕ Add Google Drive link

➕ Add Microsoft OneDrive link

➕ Add from template

Parent folder

Certificates

Demo User Documents

Human Resources

Marketing

Old Intranet

Projects

Sales

1 item selected

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

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What are you looking for?

14:32

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Admin

Admin > Documents > Documents list

DOCUMENTS

Manage documents list

UTILITIES

Documents import

Documents export

Trash can

Documents reports

Documents permissions report

CONFIGURATION

General configuration

Metadata

Root / Document Library

Collapse all

Expand all

Select view

Default

➕ Add a marker

🗑️

📄

📁

🔍

	All	Name	Size	Owner	Last modified	Description
①	<input type="checkbox"/>	Document Library		Claromentis Administrator	24-10-2024 12:32	
①	<input type="checkbox"/>	Certificates		Claromentis Administrator	16-10-2023 13:07	
①	<input type="checkbox"/>	Demo User Documents		Claromentis Administrator	30-11-2022 21:59	Demo users can upload documents within this folder
①	<input type="checkbox"/>	Human Resources		Claromentis Administrator	05-04-2022 10:55	

Google Drive Digital Marker Example

Documents > Document Library > Marketing > Add new Marker

Title June Campaign Dossier

Tags popular tags: intranet, claromentis, microsoft, excel, social

Comments

Location (URL) https://docs.google.com/document/d/1_TJHm2QWMIDodybSoYoWa36
Google Drive Location

Office Name

Description

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 > Marketing

Filter the current folder

☐ ^ Parent folder

☐ ☆ Case Studies

☐ ☆ Example Document.docx

☐ ☆ June Campaign Dossier

☐ ☆ Pages or Custom VI Version 9.mp4

☐ ☆ Technical and Professional Services Brochure.pdf

☐ ☆ Training Brochure.pdf

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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What are you looking for?

14:38

167

Search

june campaign

All Documents People News Knowledge Base Pages InfoCapture Courses More

6 results (0.898 seconds)

June Campaign Dossier

Document Library > Marketing

MyHotel Corporate Rates.doc

Document Library > Sales > Visit Brighton

Support and Maintenance Overview.pdf

Document Library > Sales > Support and Maintenance Documents

SAAS Support and Maintenance Overview.pdf

Document Library > Sales > Support and Maintenance Documents

000572: Customer behaviour

Incident Report

Can't find what you're looking for?

Let us know...

Submit

Documents > Document Library > Marketing > June Campaign Dossier

June Campaign Dossier

Full screen

Location (URL)Google Drive Location

OverviewComments 0

Record types metadata

Last modified

Claromentis Administrator

on 24-10-2024 14:37

Owner

Claromentis Administrator

Created on 24-10-2024 14:37

Viewed by

Created on 24 October 2024 by [Hannah Door](#). Last modified on 6 November 2025

Tags: [document](#), [files](#), [location](#), [digital](#), [marker](#)