



Documents: Uploading files from the front end

Documents can be added to folders from the [front end](#) or [admin side](#) of the Documents application by users with the appropriate permissions to these areas. This guide will detail the steps to follow when uploading from the front end.

The default file size upload limit in Claromentis is 80MB.

Any file larger than this will fail to upload and cannot be uploaded unless the limit is raised or the file is made smaller.

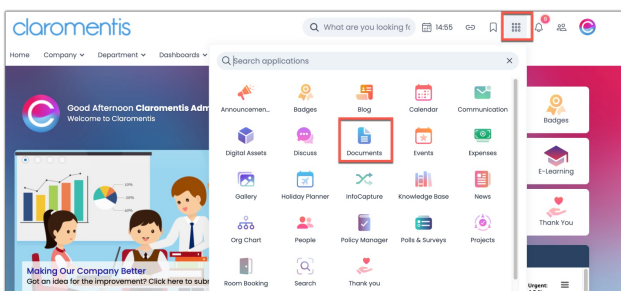
Our technical support team can raise the limits either temporarily to allow large exports/imports to run, or more permanently if your site requires larger file uploads frequently.

If you are ever unsure if your file is too large or if you need further assistance with uploads in general, please [raise a support ticket](#) so we can investigate.

Uploading files from the front end

The front end of Documents (Applications > Documents) will be used by the majority of end-users.

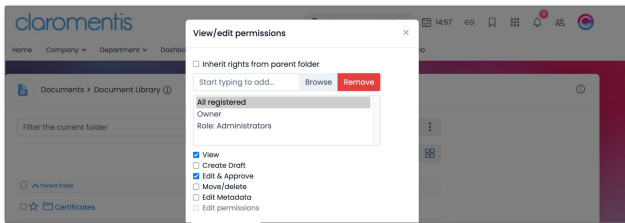
Accessing the application, they will be able to see all the folders, subfolders and files application administrators of Documents have given them permissions for.



Similarly, users will only be able to upload files on the front end of the application if they have the correct permissions to do so.

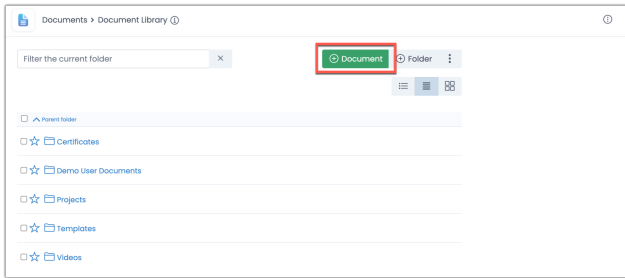
Our document [permissions](#) guide covers what each permission means and our guide here covers how administrators can give them to users.

To see the upload button in a folder, a user needs at least 'View' and 'Edit & Approve' permissions to that folder:



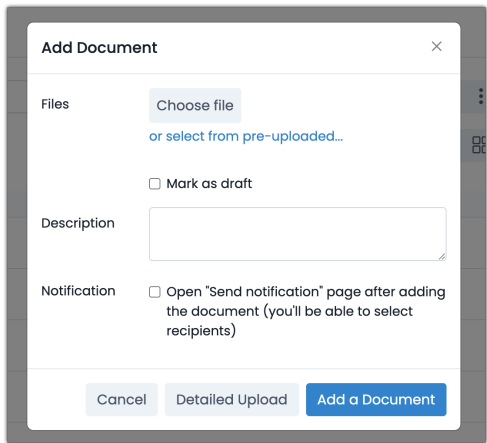
Steps to upload

- 1. Go to Applications > Documents
- 2. Navigate to the folder that you wish to add a file to, and click the green '+ Document' button:

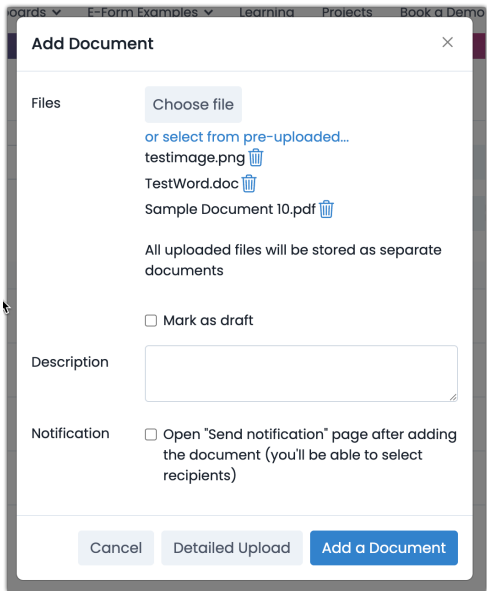


- 3. Select the file(s) for upload

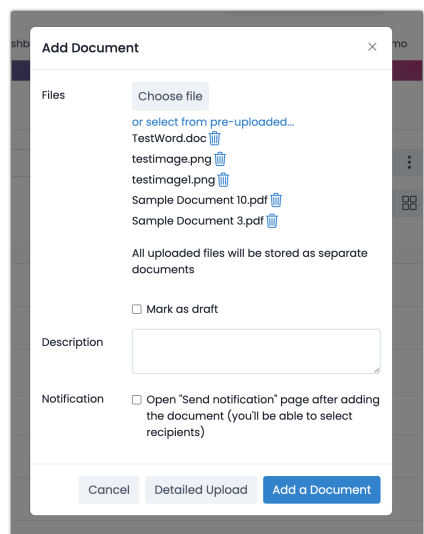
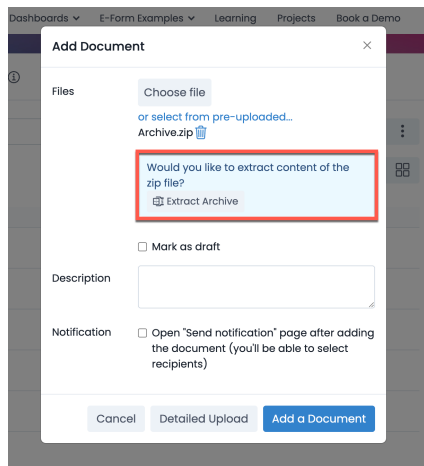
A pop-up will appear where you can click "Choose file" to select a document from your local drive, or you can select a pre-existing file that has been uploaded to your site but not used anywhere yet.



Multiple documents can be uploaded at once, select multiple items from your computer, and they will appear as separate documents in the pop-up:

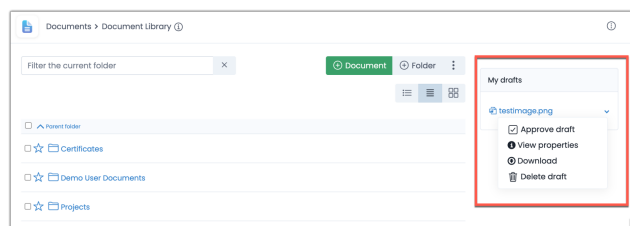


Alternatively, you can combine multiple files in a zip file, upload them and then choose Extract to store them as individual files:

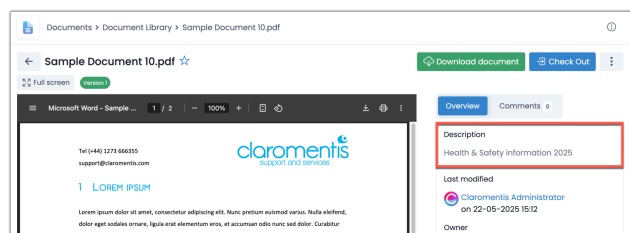


4. Consider using the other optional features in the pop-up

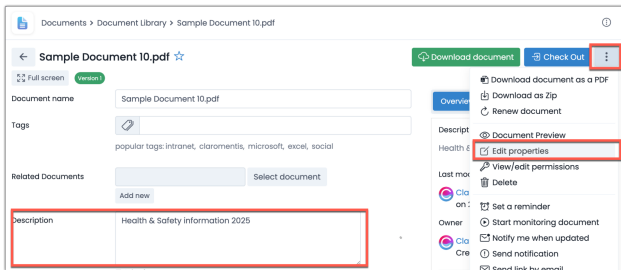
- The 'mark as draft' checkbox will upload the files in a draft status for approval later or by other users with approval permissions:



- A description can be given to the file(s) being uploaded, and this will appear in the 'Overview' tab of the document preview

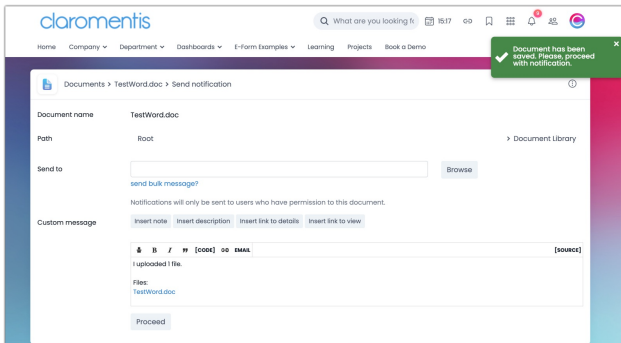


It can be edited any time by a user with 'Edit Metadata' permissions



- Choose whether to send a notification to certain users to let them know about the upload.

If this option is chosen after clicking 'Add a document,' you will be prompted to select who to notify and can construct a custom message:



'Clicking 'proceed' will send the notification, but the document has already been uploaded, so if you want to back out of the notification, you can click back in the breadcrumb trail or navigate away from the page.

- Choose whether to use the detailed upload option

Open a second screen to enter additional information about the file being uploaded, such as tags, metadata, and type, as well as assign permissions and change notification settings before uploading.

Please note: Your team can add custom metadata fields to appear in this area. Instructions on how to add these are [here](#)

Documents > Document Library > Add new Document

Files

Choose file
or select from pre-uploaded...

Tags

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

Related Documents

Select document

Add new

Description

Version comment

Permissions

☒ Inherit rights from parent folder

Start typing to add...

Browse

Remove

All registered

Owner

Role: Administrators

☐ View
 ☐ Create Draft
 ☐ Edit & Approve
 ☐ Move/Delete
 ☐ Edit Metadata
 ☐ Edit permissions
 [View effective permissions...](#)

Notifications

☒ None
 ☐ Select recipients

Status

☐ Mark as draft

Add a Document

Tags - Add tags to group documents to act as a filter and make them searchable by keywords.

Related Documents - (Custom added metadata - needs to be manually created in your system) Can link to other documents in the system. They will appear on the right-hand side when viewing any linked document for easy navigation.

Description - Add a short explanation of what the document contains or is to be used for.

Version Comment - If this was the 3rd version of a document, a comment here can let others know what has changed within the file compared to previous versions.

Permissions - Area to assign permissions to people, roles, and groups. Ensure those who need to edit can do so.

Notifications - Upon uploading the document chose this option to send a notification to specified individuals to let them know the document is now accessible.

Status - If "Mark as draft" is checked only the owner and those with correct permissions will be able to see the uploaded file as it has not been made live. Whilst in draft the document is hidden from all end-users, until the draft has been approved, where it can then be accessed from the system.

5. Click 'Add a document' to upload the file to the folder location you were in.

By default, the document will be set to inherit the permissions from the parent folder, giving access to the same users/roles/groups entered into it.

The file will appear listed in the folder location and a green message will appear on screen confirming the upload:

