Link to article: https://discover.claromentis.com/knowledgebase/articles/504/documents-uploading-files-from-the-front-end



# 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, pleaseraise 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.

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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:

Documents > Document Library (	D		0
Filter the current folder	×	Document     O Folder	
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#### 3. Select the file(s) for upload

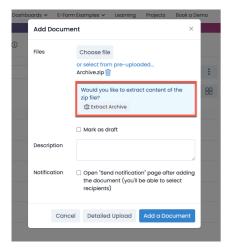
A pop-up will appear where you can click "Choose file" to select a document from your local drive, or you can select a pre-existing file that has been uploaded to your site but not used anywhere yet.

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

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	or select from pre-uploaded testimage.png 🕅
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	Sample Document 10.pdf ᆒ
	All uploaded files will be stored as separate documents
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Notification	<ul> <li>Open "Send notification" page after adding the document (you'll be able to select recipients)</li> </ul>
Can	cel Detailed Upload Add a Document

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



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### 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:

filter the current folder	×	Document     Generation
		Hy drafts
		testimage.png
A Parent folder		Approve draft
🕁 🗇 Certificates		• View properties
🗘 🗖 Demo User Documents		Download     Delete draft

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

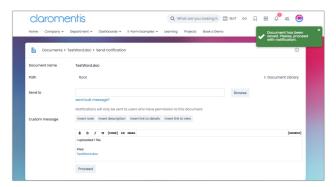


It can be edited any time by a user with 'Edit Metadata' permissions

Documents > D	ocument Library > Sample Document 10.pdf	0
← Sample Doc	ument 10.pdf 🕸	Download document     Download document as a PDF
Document name	Sample Document 10.pdf	Overvier Covervier Covervier Covervier
Tags	Popular tags: intranet, claromentis, microsoft, excel, social	Descript © Document Preview Health &
Related Documents	Select document	View/edit permissions     Delete
Description	Health & Safety information 2025	on: 12 Set a reminder Owner (6) Start monitoring document
		Cia Motify me when updated     Cre     O Send notification     Send link by email

- 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 arehere

Documents > D	ocument Library > Add new Document	
Files	Choose file or select from pre-uploaded	
Tags	0	
	popular tags: intranet, claromentis, microsoft, excel, social	
Related Documents	Select document	
	Add new	
Description		
	Inherit	
Version comment		
Permissions	Inherit rights from parent folder Start typing to add Browse Remove	
	All registered Owner Role: Administrators	
	Move/dalate 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:

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🔆 🗖 Projects		
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