Link to article: https://discover.claromentis.com/knowledgebase/articles/504

Documents: Uploading A File

How to add documents in the DMS

Documents can be added to folders from the front end and admin side of the Documents application.

This is of course dependent on if you have the appropriate permissions.

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

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

It is possible for our technical support team to 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.

Adding documents in the front end

Go to Applications > Documents.

- Navigate to the folder that you wish to add a document to, and click the green "Add Document" button.
- 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.
- The fastest way to upload this document is to click "Add a document" from this pop-up. It will then appear in your chosen location in the system.
    - Multiple documents can be uploaded at once, select multiple items from your computer and they will appear as separate documents in the pop-up.

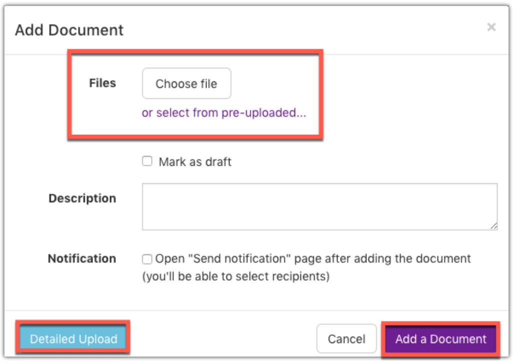


Image 1 - Initial pop-up when adding a document. Use the detailed upload button if appropriate.

However, if required, you can input additional information about the document using the "Detailed Upload" button.

- This will take you to a page similar to (Image 2) where you can enter additional information about the document such as tags, metadata, and type, as well as assign permissions and change notification settings before uploading.

Please note: Some options shown below may be missing from your system. This is because they are custom added metadata and need to be manually added to a new system. e.g. Author. If you wish to add the fields that are below but not in your system you can find instructions on how to do so here

- Regardless of which upload method you have chosen, once all relevant details have been inputted, click "Add a Document."

- Your file should now be in the system.

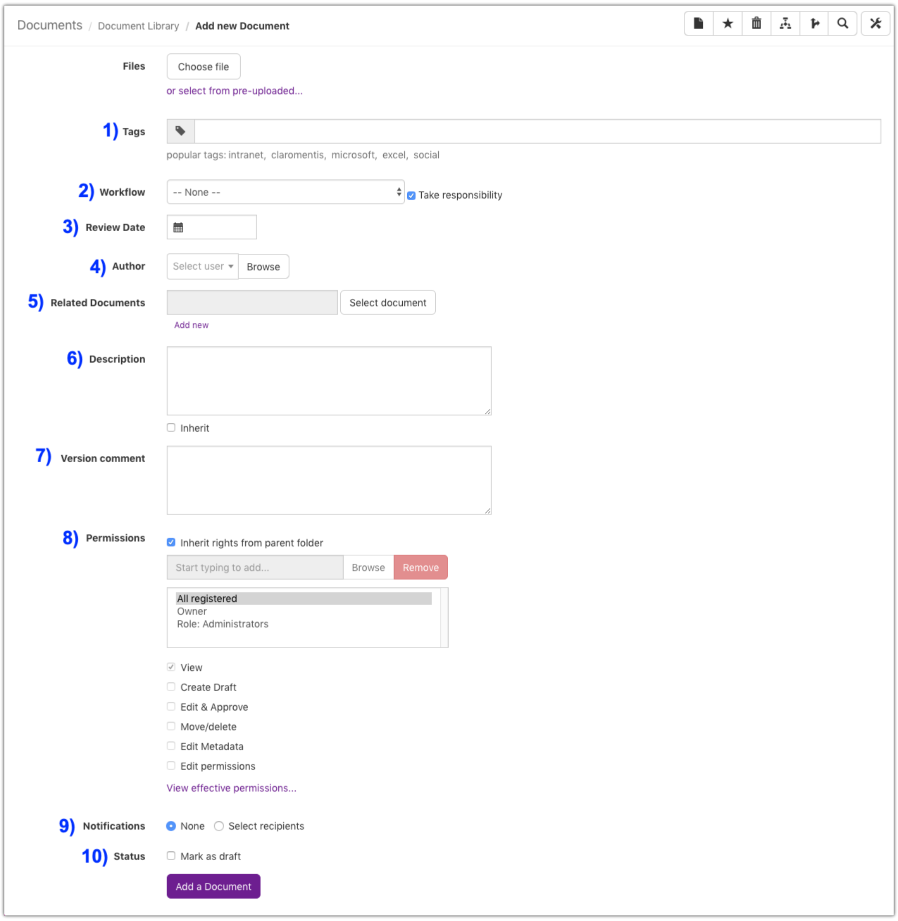


Image 2 - Detailed upload pop up

Detailed upload screen breakdown:

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

2) **Workflow** - A feature that acts as an approval system for documents before being published.

3) **Review Date** - (Custom added metadata - needs to be manually created in your system) A chosen time frame that a document should be reviewed and or renewed if necessary.

4) **Author** - (Custom added metadata - needs to be manually created in your system) Enter the name of the person who wrote the document. This may differ from the person who is uploading it.

5) **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.

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

7) **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.

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

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

10) **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.

Adding documents on the admin side

Whilst it is recommended that documents are added in the front end, it is possible for Application administrators to add them from the admin side.

- Go to Applications > Admin > Documents.
- On the right-hand side click "Manage documents list".
- From the folder hierarchy select the folder that you wish to add a document to and click the "Add a Document" button (shown in image 3).
- Now you will see the same pop-up options shown in Image 2.
- Fill out all the details required and select "Add document" at the bottom to upload the file to the system.

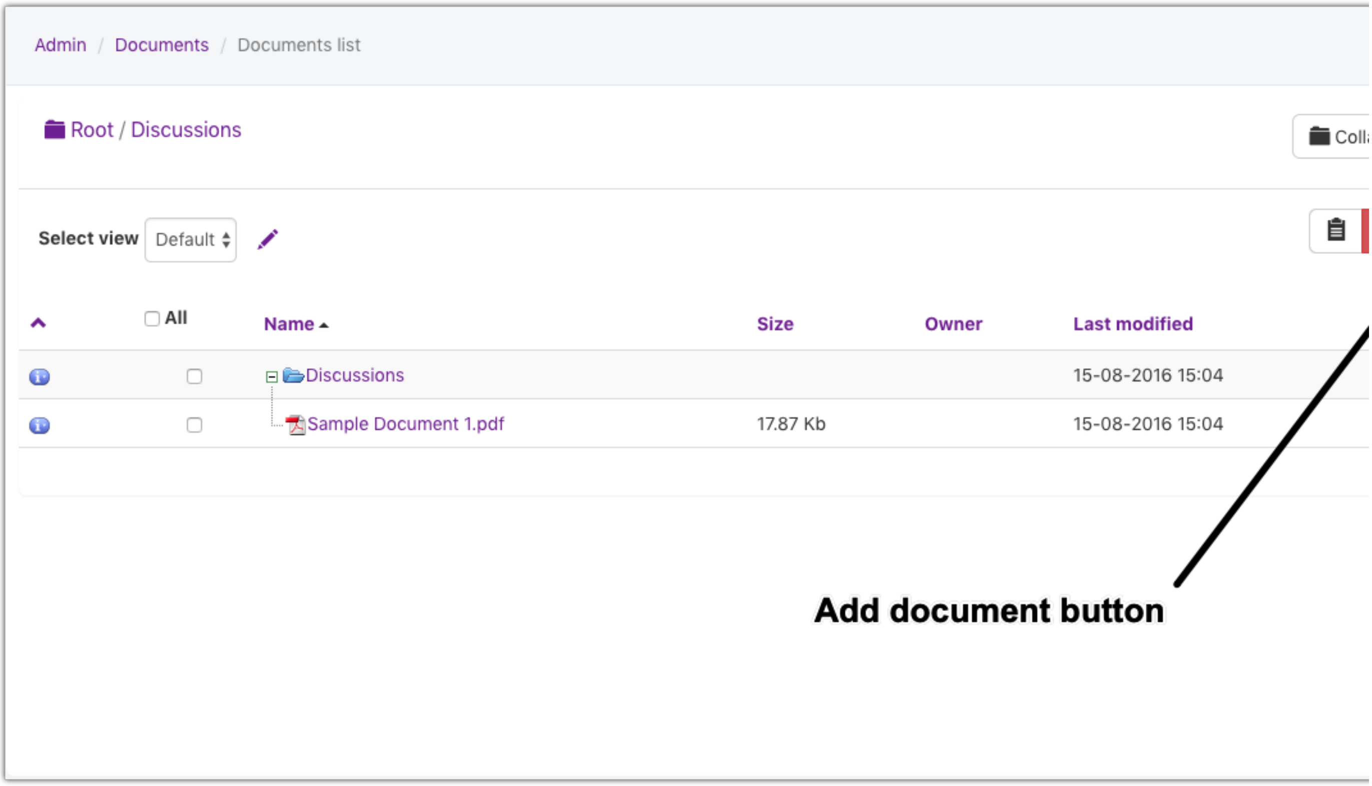
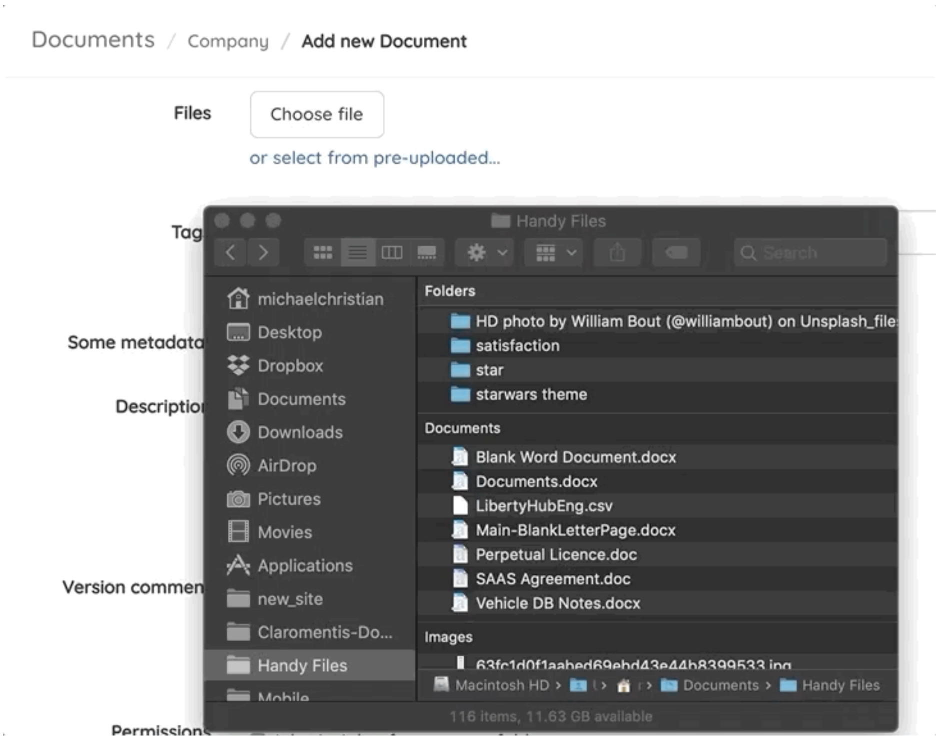


Image 3 - How to add a document from the 'Manage document list' area

Useful tips

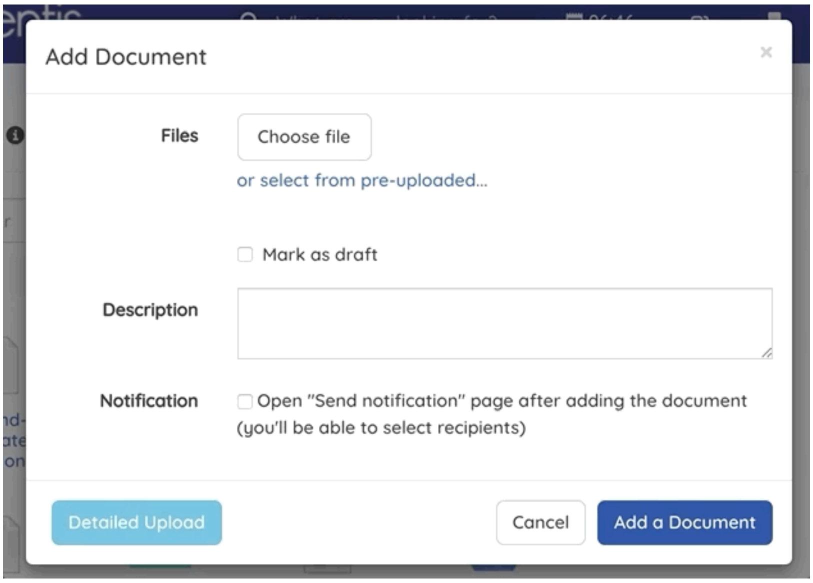
1. Multiple file upload

If you have several files that share the same metadata, it is possible to simply drag and drop multiple files into the upload field to have them uploaded in one go.



2. Uploading a zip file and then extracting them

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



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