

# Documents Admin

## Introduction

The admin side of Documents contains features that can be applied to display or configure specific information.

- Some of these areas are explained in their own User Guides.
- It is recommended to read these for more insight and to understand how all the sections fit together as well as where to locate them.
- This article is more of a general overview of the back end of documents and what each section is used for when presented with the screen shown in Image 1.

Go to Applications > Admin > Documents.

The screenshot shows the 'Documents Admin' interface. At the top left, there is a breadcrumb 'Admin / Documents'. The interface is divided into several sections:

- ERMS features (1):** A list of toggle switches for various ERMS configurations, including 'Use ERMS records', 'Use ERMS markers', 'Use record types', 'Use multi-component documents', 'Use security levels', 'Use MD5 signature', 'Use export/import for ERMS objects', 'Use ERMS schedules', 'Use Google documents links', and 'Use Microsoft OneDrive links'.
- Statistics (2):** A table with 7 rows and 2 columns showing document statistics.
- Documents (3):** A menu item 'Manage documents list'.
- Utilities (4):** A list of utility actions: 'Documents import', 'Documents export', 'Trash can', 'Documents reports', and 'Documents permissions report'.
- Configuration (5):** A list of configuration options: 'General configuration', 'Metadata', 'Record types', 'Templates', and 'Google authentication'.

Statistics	Value
Number of Documents	87
Number of all versions of documents	95
Number of checked out documents	0
Total space occupied by documents	402.02 Mb
Number of deleted documents and folders	2
Size of deleted documents	89.03 Kb

Image 1 - Documents admin screen

## 1. ERMS features

These options can be changed dependent on company needs for the system (Accessed through the general configuration tab shown in section 5)

## 2. Statistics

A table summary giving figures on the documents application as a whole. A straight forward breakdown of information stored in the document management system.

## 3. Manage Documents List

Covered in the user guides "Creating Folder Structure" and "Uploading a Document". From this screen you can access the folder directory and manipulate folders from the root level onwards.

## 4. Utilities

- Import/export is not a standard feature and not all users can import large amount of documents in this way. It will likely require work from the technical support team at Claromentis. (Submit a support ticket on Discover for help with this) However bulk imports are always configured initially for your Intranet to

get all your documents in the system.

- Ability to run reports on documents uploaded, see User guide "Document reporting" for an in depth explanation.
- Trash can holds deleted items for 30 days, and are restorable as shown in Image 2. From the admin side you are able to restore any users deleted items. Trash can also be accessed from the front end of documents just for your own deleted documents.
- The documents permission report gives an overview table of a users access rights. As shown in Image 3, you can select any user on the site and the table will display what rights they have for every folder and file. This can also be exported as a CSV file.

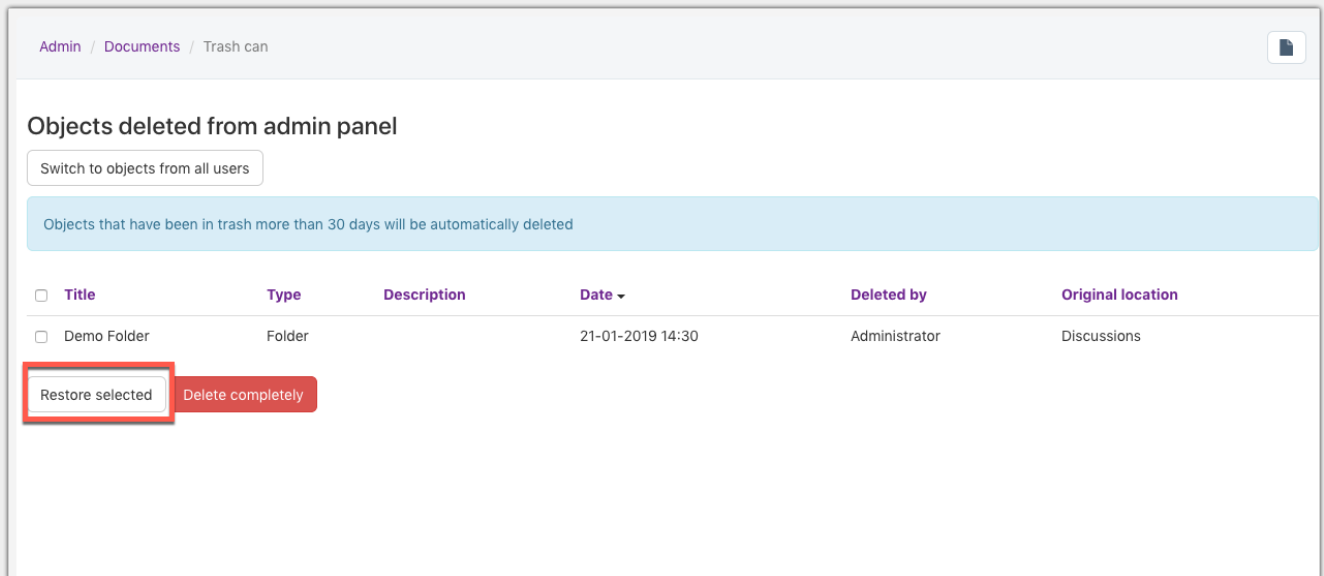


Image 2 - Trash can from admin side of Documents and restore button

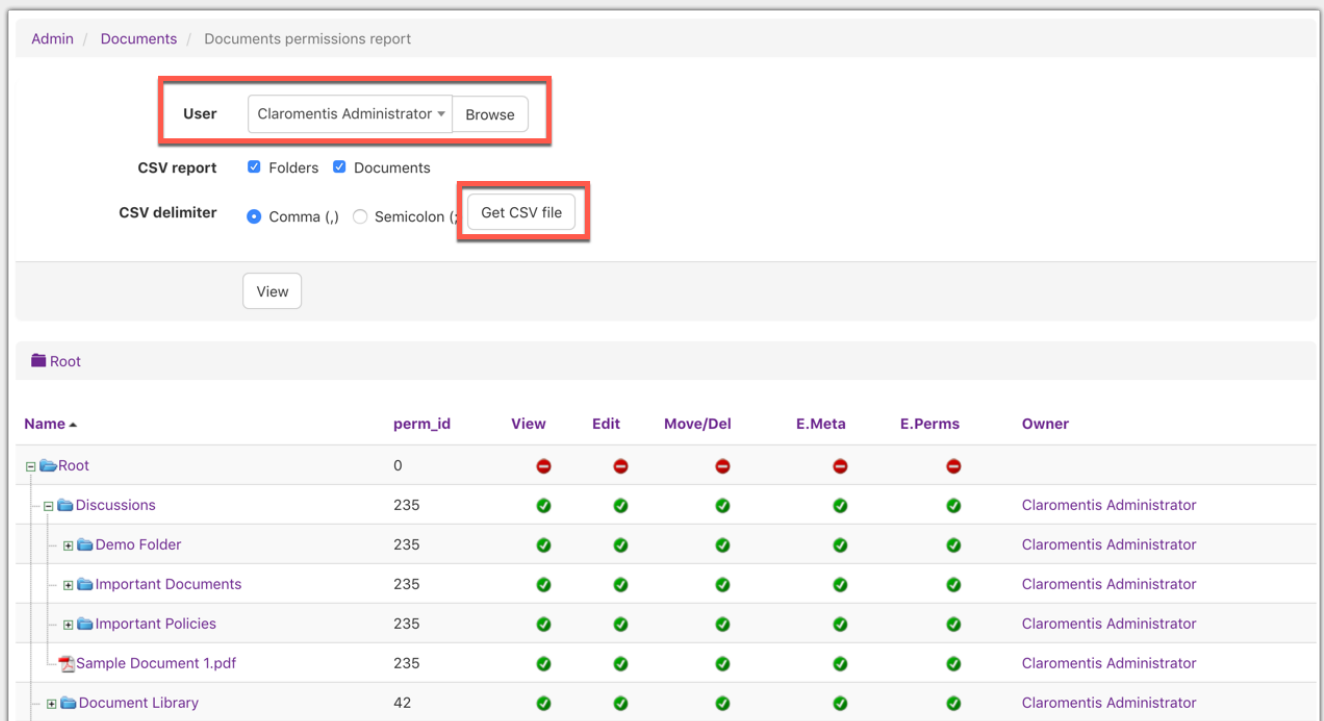


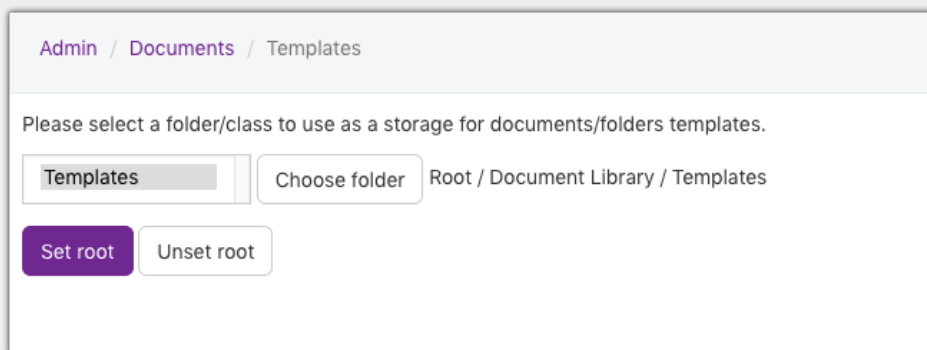
Image 3 - Documents permissions report showing the access rights for Claromentis Administrator

## 5. Configuration

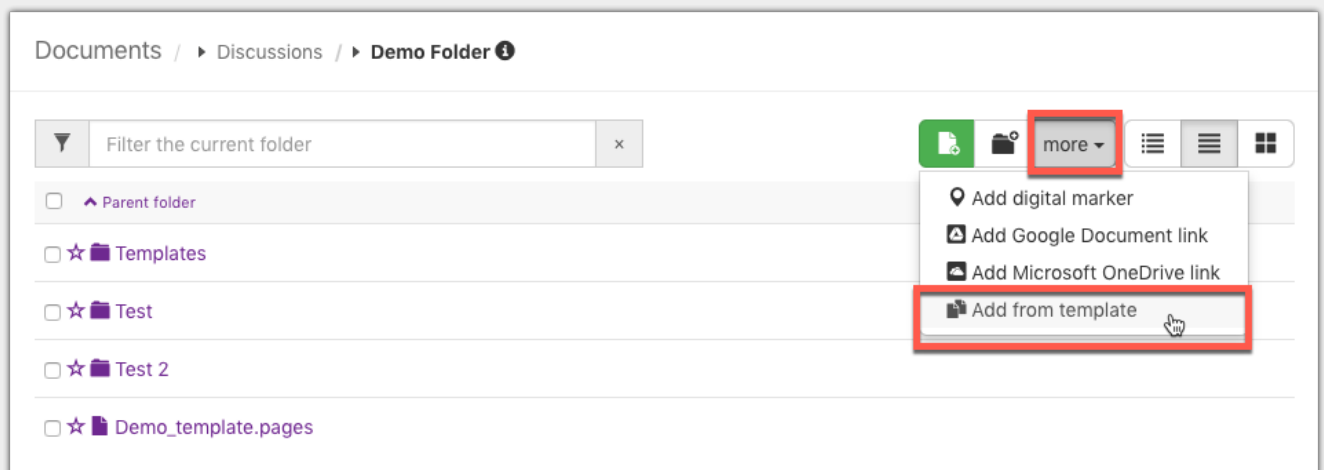
- General configuration is a list of tweaks to the overall document structure, accessibility and ease of use. For example, Allow renewal of documents without checking out
- Metadata is essentially data about data. It is additional information added to that pre existing, as way to

further define it. For example, adding new fields such as "author" or "review Date" means folders/documents can be further defined and searchable in Claromentis. The user guide "Document Metadata" explains this in more detail further.

- Record types are a legacy aspect. A way of uploading documents by category and filtering them by this characteristic. It is best to use metadata in this way going forward because this is a supported function in the latest versions of Claromentis (and record types is not).
- Templates establishes a folder to store company literature e.g.letterheads, company logos, draft material. This is within reach no matter where you are in the directory as the option to use a template can be selected from the documents front end. This enables a document to be quickly downloaded and worked on as well as keeping all the companies templates in one place.
  - From the admin side you can select which folder will store these items. From the front end you will be able to upload all required, as well as access them at any time by using the "more" button.
- Google - A control panel to connect with a Google account that has access to the documents you want to share with Claromentis. In order to use this function you will need to set up an API key. Please see related User Guides to set this up. After that is done, Google documents can be seen from the front end.



*Image 4 - Assigning a templates folder from admin side of documents*



*Image 5 - How to use the templates feature from the front end of documents*

## Related Article

[Creating Folder Structure](#)

[Uploading A Document](#)

[Document Reporting](#)

## Document Metadata

### Setting up Google API Integration for Map, Drive, Picker in Claromentis 8.3+

Created on 20 January 2019 by [Hannah Door](#). Last modified on 3 April 2019

Tags: [documents](#), [intranet](#), [user guide](#)