



Documents: Admin Overview

Only **application administrators** of the Documents application can access this area via Applications > Admin > Documents.

The screenshot shows the 'Admin > Documents' page. The left sidebar has a navigation menu with the following items:

- DOCUMENTS 3**
 - Manage documents list
- UTILITIES 4**
 - Documents import
 - Documents export
 - Trash can
 - Documents reports
 - Documents permissions report
- CONFIGURATION 5**
 - General configuration
 - Metadata
 - Record types
 - Templates
 - Google authentication

The main content area is divided into three sections:

- ERMS features 1**: A list of toggle switches for various ERMS features.

Feature	Status
Use ERMS records (ERMS_CONFIG_RECORD)	Off
Use ERMS markers (ERMS_CONFIG_MARKERS)	Off
Use record types (ERMS_CONFIG_RECORD_TYPES)	On
Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)	Off
Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)	Off
Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)	On
Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)	Off
Use ERMS schedules (ERMS_CONFIG_SCHEDULE)	Off
Use Google drive links (ERMS_CONFIG_GDOC_LINKS)	On
Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)	On
- Statistics 2**: A table showing document statistics.

Statistic	Value
Number of Documents	89
Number of all versions of documents	95
Number of checked out documents	0
Total space occupied by documents	403.13 Mb
Number of deleted documents and folders	1
Size of deleted documents	1.54 Mb
- Manage documents list 3**: A link to view the list of documents.

1. ERMS features

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

2. Statistics

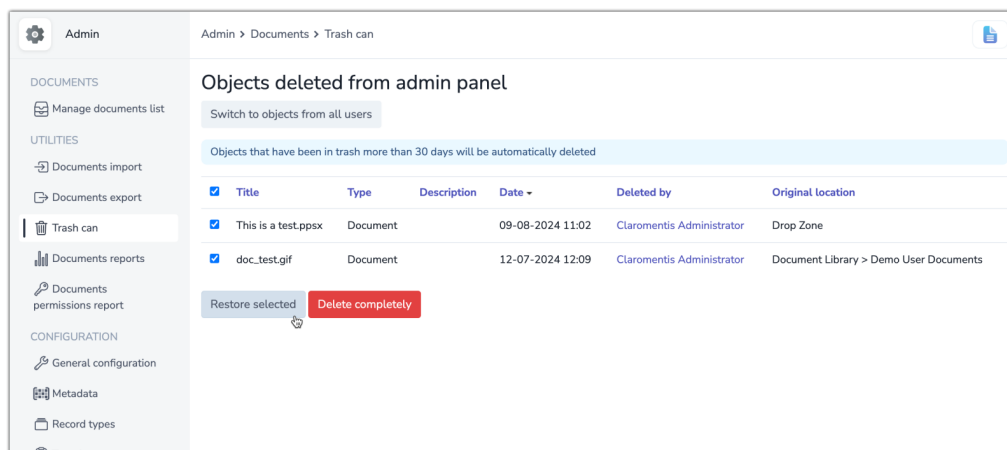
A table summary gives figures on the document application as a whole. A straightforward breakdown of information stored in the document management system.

3. Manage Documents List

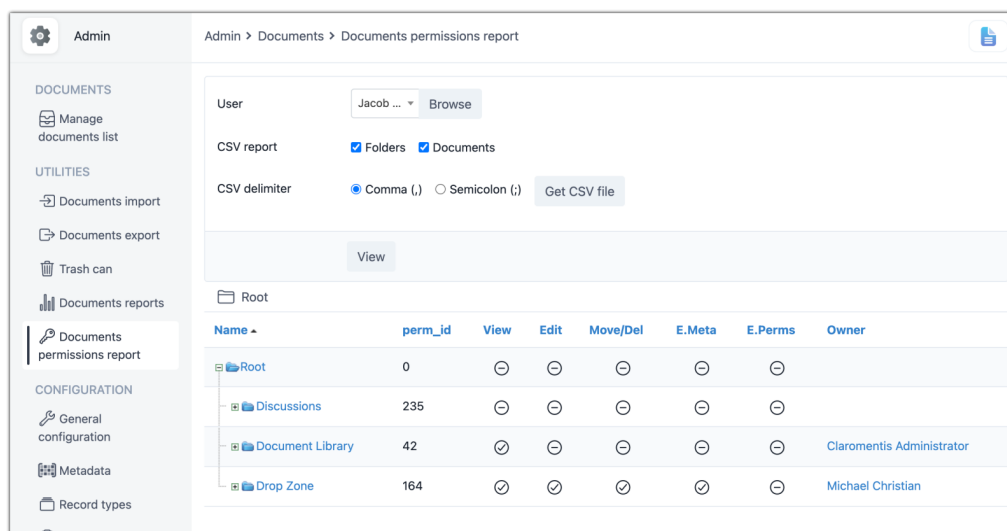
Covered in the user guides ["Creating Folder Structure"](#) and ["Uploading a Document"](#). From this screen, you can access the folder directory and manipulate folders from the root level onwards.

4. Utilities

- Bulk imports are always configured initially for your Intranet to get all your documents in the system. [Further imports](#) can only be carried out yourself if your system is self-hosted. [Exports](#) are the same.
- The trash can holds deleted items for 30 days and is restorable. From the admin side, you are able to restore any user's deleted items. Trash can also be accessed from the front end of documents just for your own deleted documents.



- Ability to run reports on documents uploaded, see ["Document reporting"](#) for more information.
- The document permission report gives an overview table of a user's access rights. Select any user on the site and the table will display which rights they have for every folder and file. This can also be exported as a CSV file.

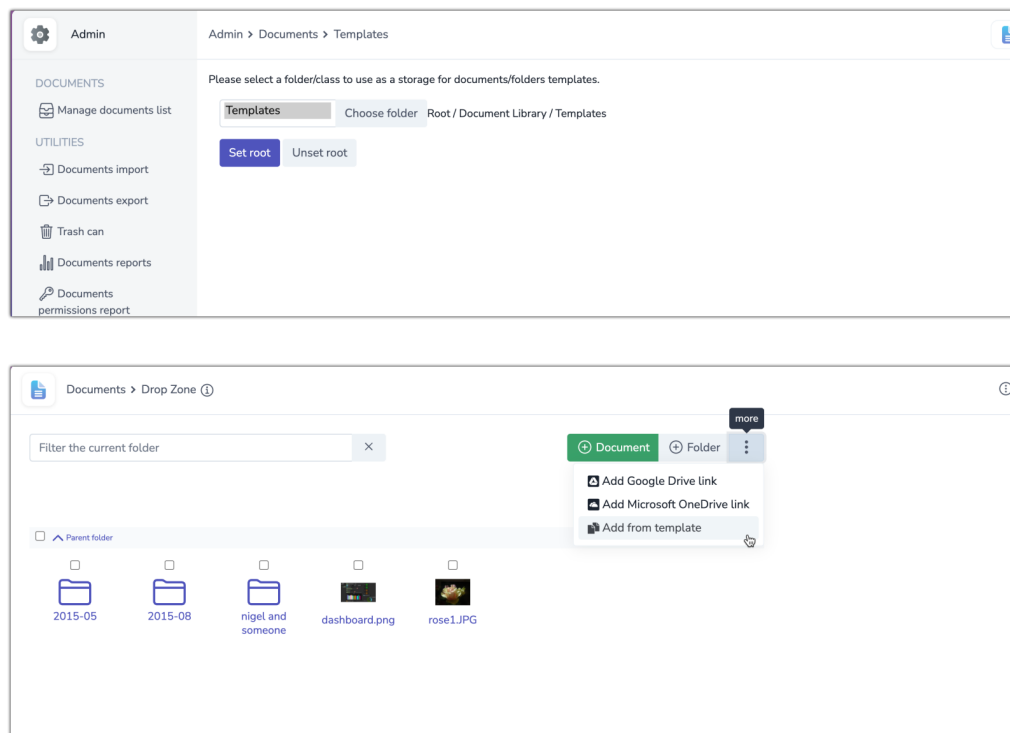


5. Configuration

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

- 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 are not).
- Templates establish a folder to store company literature e.g. letterheads, company logos, and 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 document's front end. This enables a document to be quickly downloaded and worked on as well as keeping all the company's templates in one place.
 - From the admin side, you can select which folder will store these items. From the front end these can be accessed using the 'more' button:



- Google Authentication - A control panel to connect with a Google account that has access to the documents you want to link in Claromentis. To use this function, you will need to set up an API key. More information [here](#).