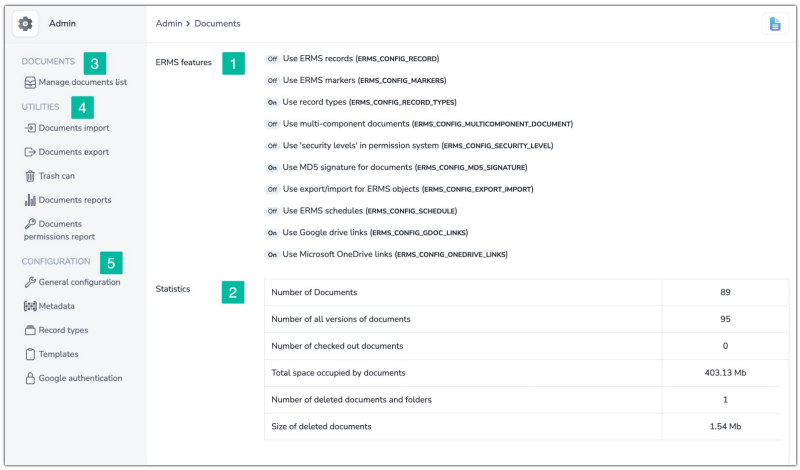
Link to article: https://discover.claromentis.com/knowledgebase/articles/508/documents-admin-side-general

Documents: Admin Side (General)

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

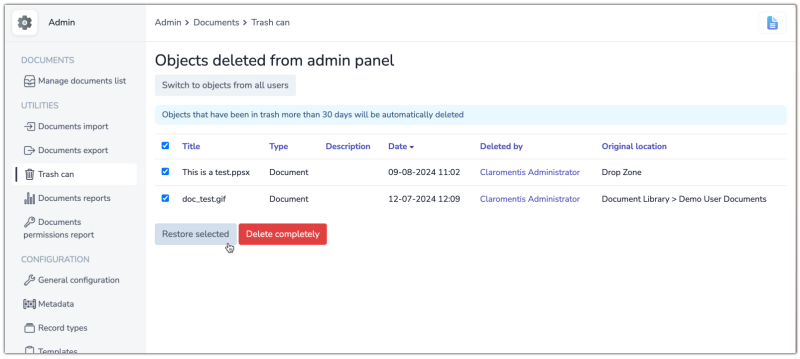
A table summary gives figures on the document application as a whole. A straightforward breakdown of information stored in the document management system.

3. Manage Documents List

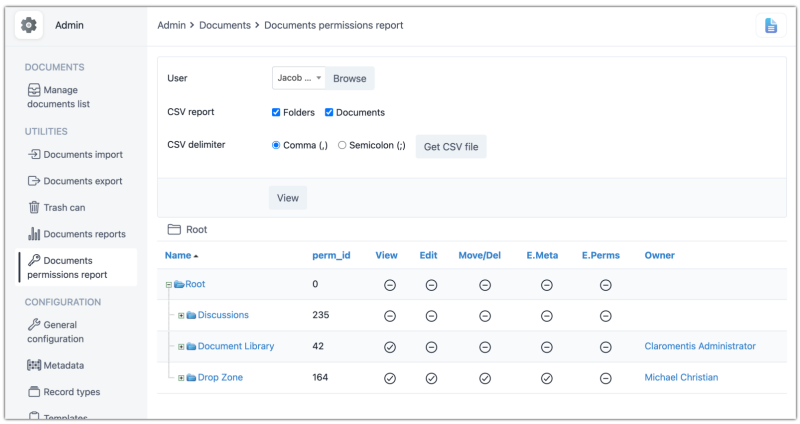
Covered in the user guides "Creating Folder Structure" and "Uploading a Document". From this screen, you can access the folder directory and manipulate folders from the root level onwards.

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.

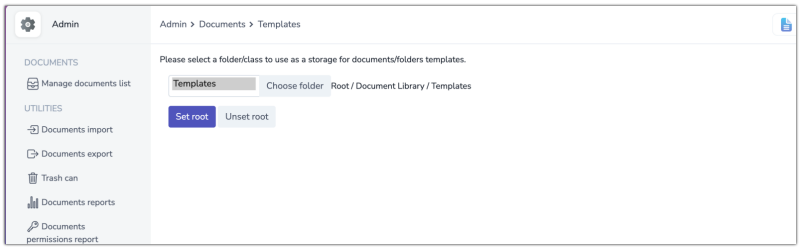


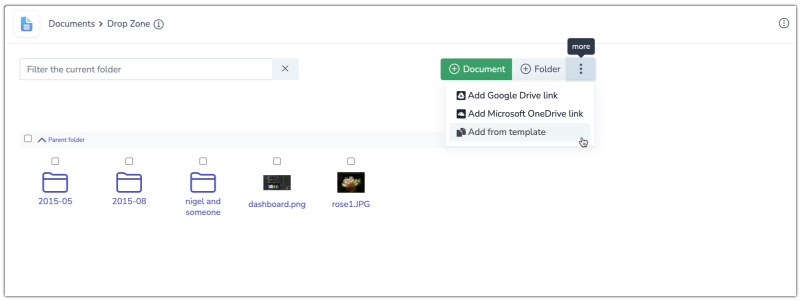
- Ability to run reports on documents uploaded, see "Document reporting" for more information.
- The document permission report gives an overview table of a user's access rights. Select any user on the site and the table will display which rights they have for every folder and file. This can also be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

Created on 16 July 2025 by Hannah Door
Tags: documents, intranet, user guide, administrator