



## Documents: Admin Overview

### 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 backend 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 'Admin / Documents' interface. On the left, there are two sections: 'ERMS features' (callout 1) with a list of toggle switches for various ERMS configurations, and 'Statistics' (callout 2) with a table of document metrics. On the right, there are three sections: 'Documents' (callout 3) with a link to 'Manage documents list', 'Utilities' (callout 4) with links for import, export, trash, reports, and permissions, and 'Configuration' (callout 5) with links for general configuration, metadata, record types, templates, and Google authentication.

ERMS features	
<input type="checkbox"/> Off	Use ERMS records (ERMS_CONFIG_RECORD)
<input checked="" type="checkbox"/> On	Use ERMS markers (ERMS_CONFIG_MARKERS)
<input checked="" type="checkbox"/> On	Use record types (ERMS_CONFIG_RECORD_TYPES)
<input type="checkbox"/> Off	Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
<input type="checkbox"/> Off	Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)
<input type="checkbox"/> Off	Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)
<input type="checkbox"/> Off	Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)
<input type="checkbox"/> Off	Use ERMS schedules (ERMS_CONFIG_SCHEDULE)
<input checked="" type="checkbox"/> On	Use Google documents links (ERMS_CONFIG_GDOC_LINKS)
<input checked="" type="checkbox"/> On	Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics	
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

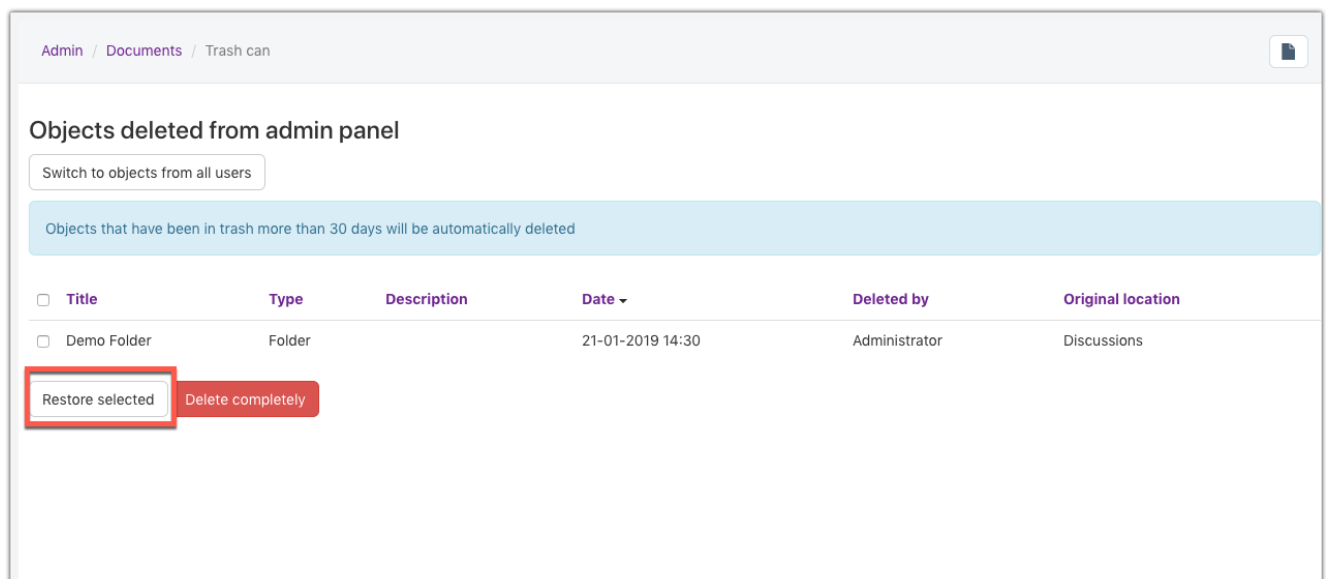
A table summary giving figures on the documents application as a whole. A straightforward breakdown of information stored in the document management system.

## 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

- Import/export is not a standard feature and not all users can import a large number of documents in this way. It will likely require work from the technical support team at Claramentis. (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 'Document reporting' for more information.
- The trash can holds deleted items for 30 days and is restorable as shown in Image 2. 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.
- The documents permission report gives an overview table of a user's 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*

Admin / Documents / Documents permissions report

User

Claromentis Administrator

Browse

CSV report

☒ Folders
☒ Documents

CSV delimiter

☒ Comma (,)
☐ Semicolon (;)

Get CSV file

View

Name	perm_id	View	Edit	Move/Del	E.Meta	E.Perms	Owner
Root	0	✖	✖	✖	✖	✖	
Discussions	235	✔	✔	✔	✔	✔	Claromentis Administrator
Demo Folder	235	✔	✔	✔	✔	✔	Claromentis Administrator
Important Documents	235	✔	✔	✔	✔	✔	Claromentis Administrator
Important Policies	235	✔	✔	✔	✔	✔	Claromentis Administrator
Sample Document 1.pdf	235	✔	✔	✔	✔	✔	Claromentis Administrator
Document Library	42	✔	✔	✔	✔	✔	Claromentis Administrator

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 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, 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 link in Claromentis. In order to use this function, you will need to set up an API key. More information here.

Admin / Documents / Templates

Please select a folder/class to use as a storage for documents/folders templates.

Templates

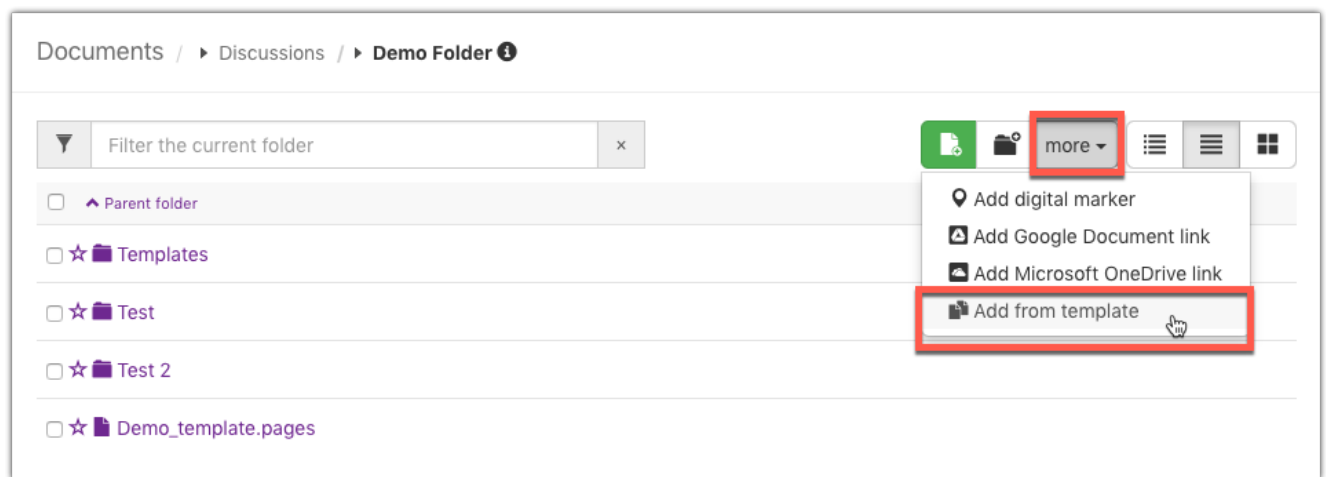
Choose folder

Root / Document Library / Templates

Set root

Unset root

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*

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## Related Article

[Creating Folder Structure](#)

[Uploading A Document](#)

[Document Reporting](#)

[Document Metadata](#)

[Setting up Google API Integration for Map, Drive, Picker in Claramentis 8.3+](#)

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Tags: documents, intranet, user guide, administrator