

Document Reporting

Introduction

Document reports can be accessed from the admin side of documents. Permissions can be set on the admin side to allow specific users/roles/groups to make reports. This means these users will also be able to access reports from the front end of documents.

- Every report can be run based on the date documents were created/last modified and can be further defined by specific users viewing rights (if required).
- Depending on what information you want to see you can use all these options to narrow your search or just one of them.
- You can export any of the reports to a CSV file for further analysis in other programs or to share more easily with others.

Getting Started - Admin Side of Documents

- Go to Admin > Documents.
- The screen shown in Image 1 is the same as you will be first presented with.
- The rest of this screen was further explained in the User Guide "Documents Admin".

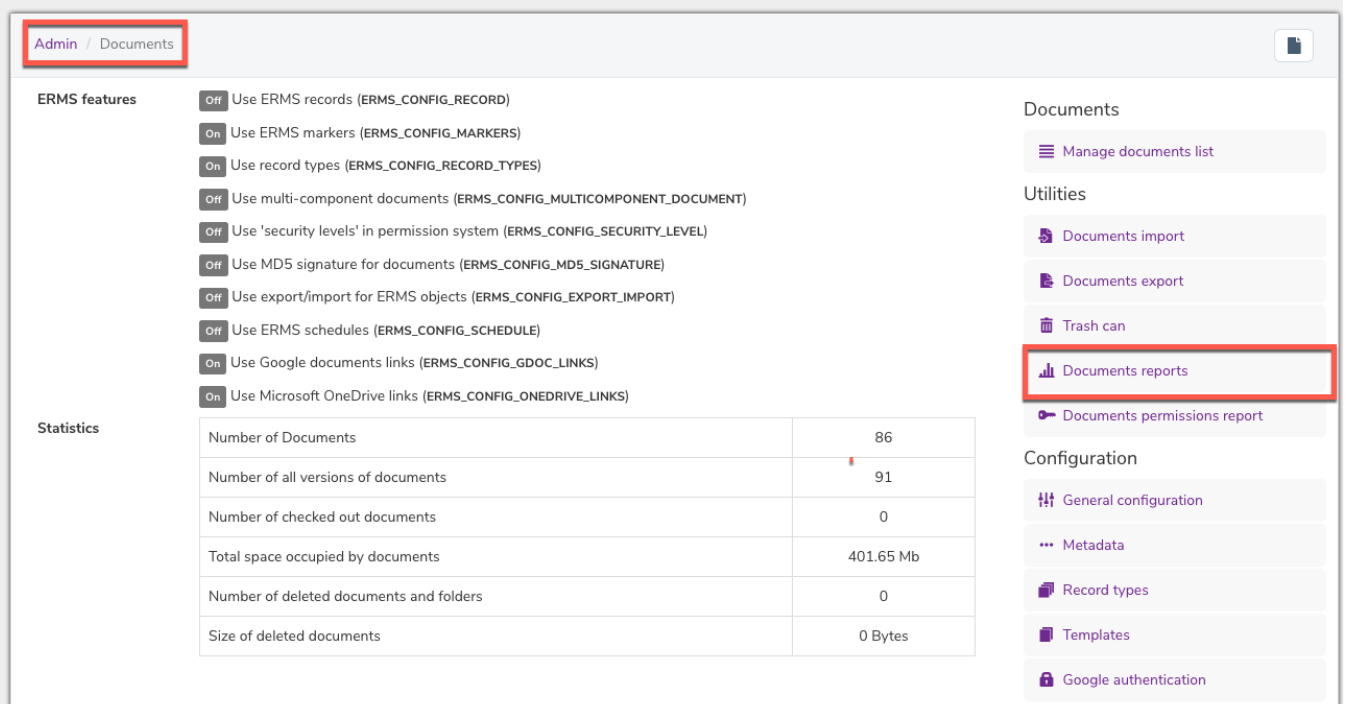


Image 1 - Documents Admin screen

There are 3 main reports available in Claromentis for Documents.

- Click onto "Documents reports" to land at the screen shown in Image 2.
- **Please note:** "Summary workflow reports", "Workflow reports" and "Number and location of folders, documents and records by specific access control markings" are all legacy aspects.
 - They aren't covered in this guide as these functions won't appear in future versions of Claromentis.
- Remember to add any users you need to into the permissions box to give them access rights to run document reports and view them.

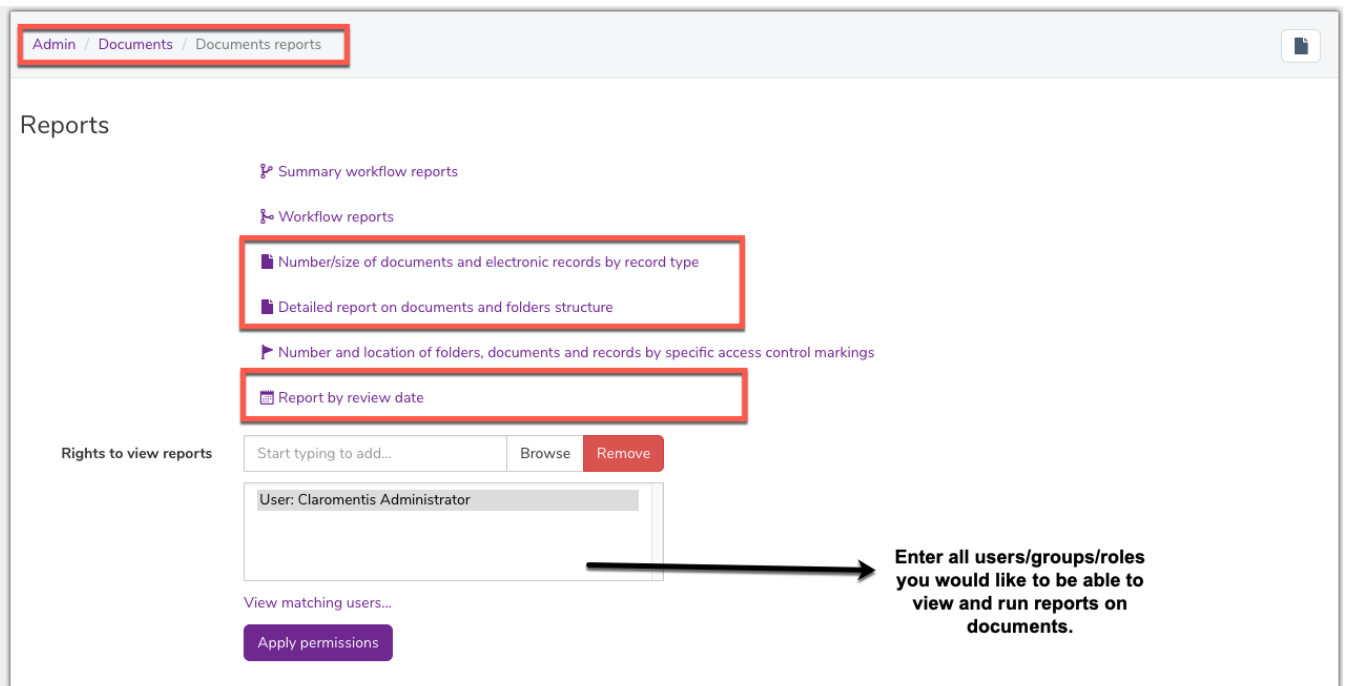


Image 2 - Documents report screen, those highlighted are the reports covered in this guide

The first method of report is the **number/size of documents and electronic records by record type**. See Image 3 for the initial screen when this option is clicked on. In this demo the report is being run for the folder "Document Library".

- Record types can be entered in the Admin > General configuration of documents.
 - **Please note:** This is now a legacy aspect and won't appear in the latest versions of Claromentis.
 - It is recommended to use metadata rather than record types.
 - You can read more about metadata in the User guide "Document Metadata".

To run this report:

- Click in the "Select folder" field and a pop up will appear of your directory for you to choose the folder you wish to run the report on.
- Choose to search for all documents by the date created, last modified or both.
 - When entering a date you don't have to select 'From' as well as 'To' unless you wish to run the report for a specific time frame. Just using "From" will also work.
- Now click "View" to run the report and the results will be displayed at the bottom of the screen.

Admin / Documents / Documents reports / The number and size of documents and electronic records by record type

Select folder:

Created: From To

Last Modified: From To

User list:

[View matching users...](#)

CSV delimiter: Comma (,) Semicolon (;)

Record type	Number of documents	Documents size
Record Type not set	82	397.79 Mb

Image 3 - As the record type function hasn't been used a total of documents in this folder is given instead.

The next method of report is the **detailed report on documents and folder structure**, see Image 4.

- In the same way as for the previous report you can define the search by a particular folder and timeframe as well as a specific user.
 - The User list is a filter. You can further define your report results by users/roles/groups.
 - This can be a helpful way of checking permissions without going folder to folder.
- The results for this report offer more insights about the documents found in your selected folder.
- Size, date created, last modified, last accessed, number of versions and the parent folder (if applicable) of the document are all supplied.



Select folder **Document Library** Choose folder Unset

Created From To

Last Modified From To

User list Browse Remove

[View matching users...](#)

CSV delimiter Comma (,) Semicolon (;) Include metadata in csv report

[View](#)

Type	Title	Size	Date Created	Last Modified	Last Accessed	Num. of Versions	Parent
	Marketing		15-04-2015 16:25	17-07-2017 10:28			Document Library
	Technical and Professional Services Brochure.pdf	7243370	15-04-2015 16:27	15-04-2015 16:27	12-02-2019 12:59	1	Marketing
	Training Brochure.pdf	1776200	15-04-2015 16:27	07-05-2015 17:38	12-02-2019 12:59	3	Marketing

Image 4 - The document Library folder's content has been displayed with a greater breakdown of information

The next report is by **review date**, see image 5.

- This is a helpful tool if you require to mass delete or keep a log of documents.
- You can set a review date per document when they are uploaded or from the admin side at any time.
- You can also search for documents by metadata you have created and attributed to documents.
 - Review date and metadata were covered in more depth in the "Uploading a document" and "Document Metadata" User guides.
- Running the review date report will display a lot of document results at once rather than finding them individually on your site.
- It is also useful if you need to keep a log of all the documents with review dates in one file. You can download the CSV file to keep as a reference or to easily distribute in your company.

Admin / Documents / Documents reports / Report by review date

From 01-12-2014 00:00 To

CSV delimiter Comma (,) Semicolon (;) [Get CSV file](#)

Metadata to show

- Review Date
- Author
- Related Documents
- Document Type
- Description
- Version comment

[View](#)

Name	Review date	Folder	Owner	Date Created	Last modified	Review Date	Author	Document Type	Description
Sample Document 11.pdf	1 August 2019	Document Library > Demo User Documents	User #2	13-01-2015 09:25	13-01-2015 09:25	1 August 2019	Abigail Clark		Screenshot of expenses spreadsheet
Sample Document 10.pdf	17 May 2019	Document Library > Demo User Documents	User #2	13-01-2015 09:25	13-01-2015 09:25	17 May 2019	Claromentis Administrator	PDF,	Timesheet hard copies
Sample Document 12.pdf	10 September 2019	Document Library > Demo User Documents	User #2	13-01-2015 09:25	13-01-2015 09:25	10 September 2019	Jennifer Langdon	PDF, Screenshot	Email from Finance about Purchase Ledger

Image 5 - Review date report has been run, metadata fields have been chosen and shown in the results.

Reports - From the Front End of Documents

The permissions box shown in Image 2 give rights to any users entered to access reports from the front end of documents.

- Images 6 and 7 are what this looks like for the user.
- When the documents reports icon is clicked the menu shown next is the same shown in Image 2, when accessing report from the admin side.

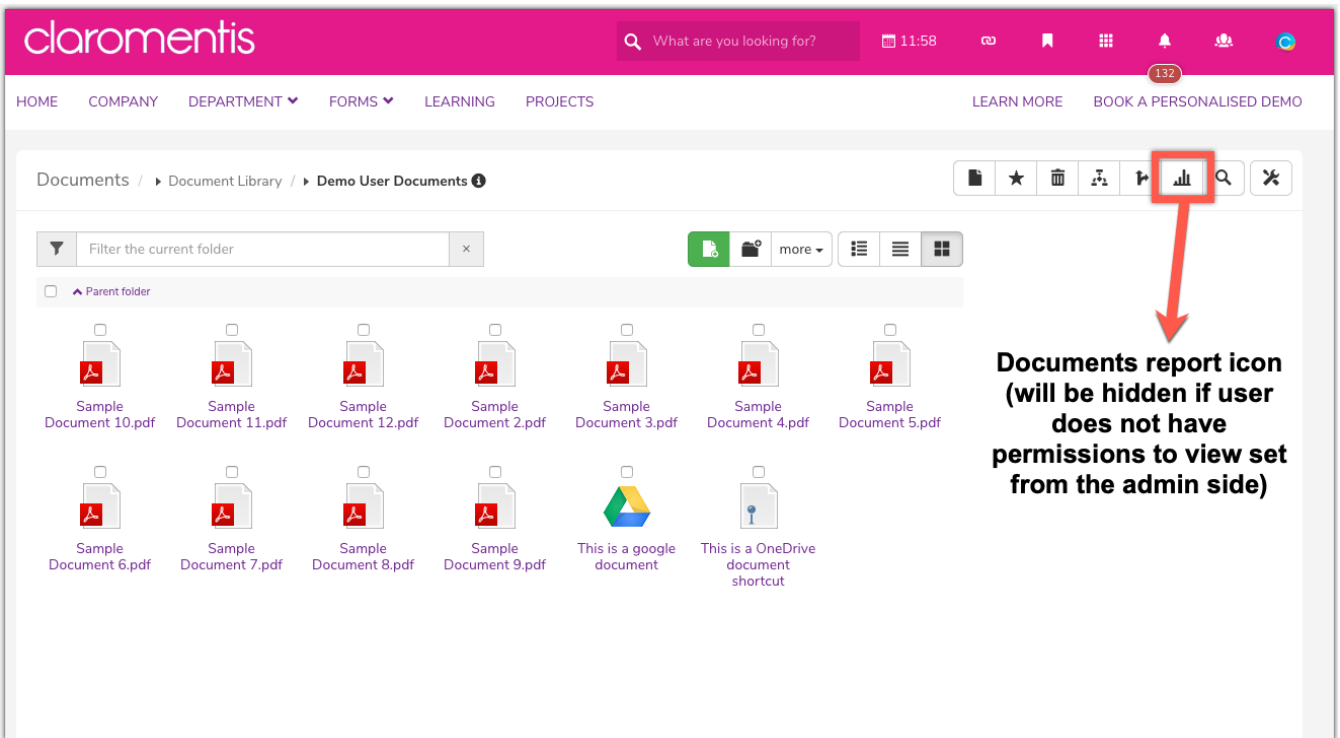


Image 6 - Document reports icon location from Documents front end

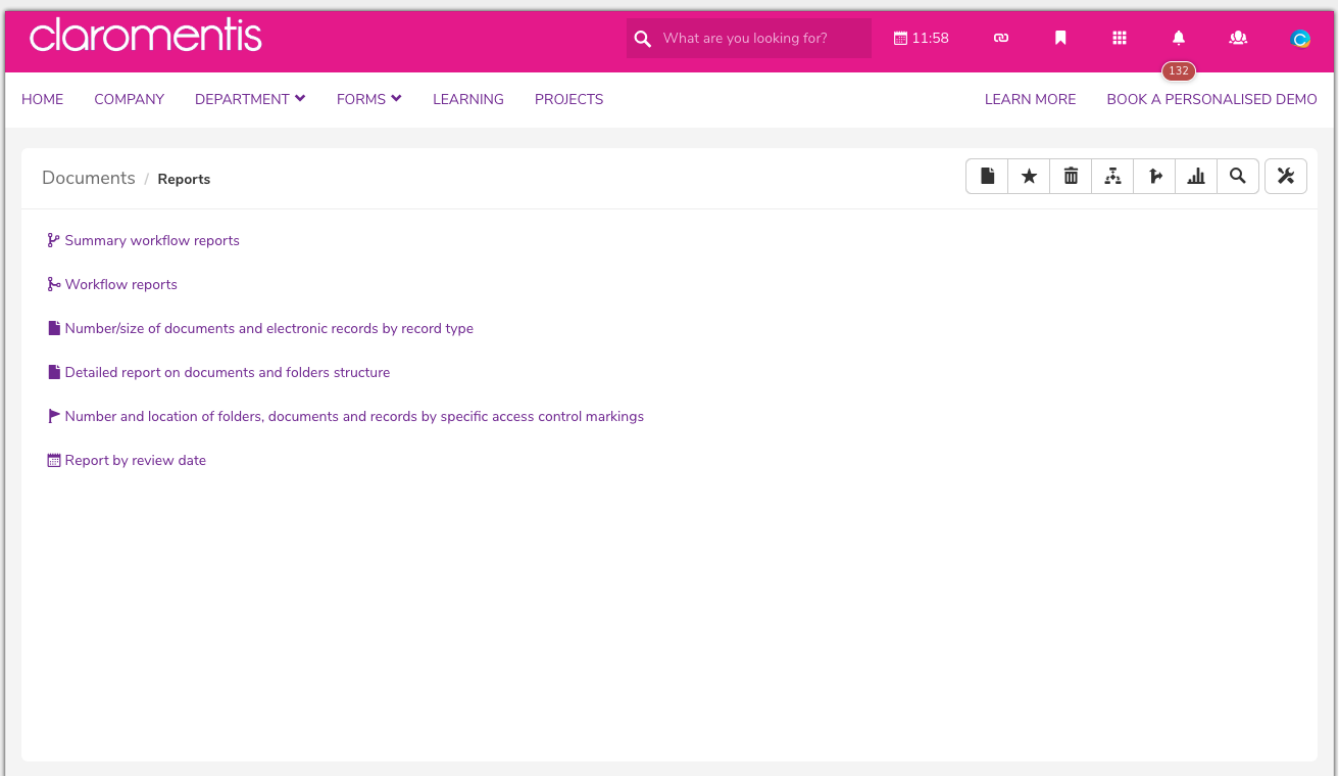


Image 7 - The reports are the same available from the admin side of Documents

Related Article

[Documents Admin](#)