



Document Reports

Introduction

Document reports can be accessed from the admin side of the application by administrators.

There is an option to allow other users to run the reports from the front end who are not administrators.

Each report can be exported to a CSV file for further analysis in other programs or to share more easily with others.

Getting Started

Go to Admin > Documents.

- The rest of the area is explained in detail in [this guide](#).

There are 4 main reports available in two tabs.

A screenshot of the 'Admin / Documents' page in a web application. The page is divided into several sections. On the left, there's a 'Documents' sidebar with a search bar and a list of navigation items: 'Manage documents list', 'Utilities' (with sub-items 'Documents import', 'Documents export', 'Trash can'), 'Documents reports' (highlighted with a red box), and 'Documents permissions report'. Below the sidebar, there's a 'Configuration' section with links to 'General configuration', 'Metadata', 'Record types', 'Templates', and 'Google authentication'. The main content area is split into two columns. The left column, titled 'ERMS features', contains a list of toggle switches for various settings like 'Use ERMS records', 'Use ERMS markers', 'Use record types', 'Use multi-component documents', 'Use security levels', 'Use MD5 signature', 'Use export/import', 'Use ERMS schedules', 'Use Google drive links', and 'Use Microsoft OneDrive links'. The right column, titled 'Statistics', contains a table with document-related metrics.

| ERMS features | Statistics |
|--|--|
| <input type="checkbox"/> Use ERMS records (ERMS_CONFIG.RECORD) | Number of Documents: 90 |
| <input type="checkbox"/> Use ERMS markers (ERMS_CONFIG.MARKERS) | Number of all versions of documents: 95 |
| <input type="checkbox"/> Use record types (ERMS_CONFIG.RECORD_TYPES) | Number of checked out documents: 0 |
| <input type="checkbox"/> Use multi-component documents (ERMS_CONFIG.MULTICOMPONENT.DOCUMENT) | Total space occupied by documents: 403.13 Mb |
| <input type="checkbox"/> Use 'security levels' in permission system (ERMS_CONFIG.SECURITY.LEVEL) | Number of deleted documents and folders: 0 |
| <input type="checkbox"/> Use MD5 signature for documents (ERMS_CONFIG.MD5.SIGNATURE) | Size of deleted documents: 0 Bytes |
| <input type="checkbox"/> Use export/import for ERMS objects (ERMS_CONFIG.EXPORT_IMPORT) | |
| <input type="checkbox"/> Use ERMS schedules (ERMS_CONFIG.SCHEDULE) | |
| <input type="checkbox"/> Use Google drive links (ERMS_CONFIG.GDOC.LINKS) | |
| <input type="checkbox"/> Use Microsoft OneDrive links (ERMS_CONFIG.ONEDRIVE.LINKS) | |

Document permissions report

Working with a document management system can often yield doubts about whether permissions have been correctly set throughout a folder structure.

Simply pick a user, and generate a report on what they can and can't see within your structure.

Admin / Documents / Documents permissions report

User

Claroments Administrator

Browse

CSV report

☒ Folders

☒ Documents

CSV delimiter

☒ Comma (,)

☐ Semicolon (;)

Get CSV file

View

| Name | perm_id | View | Edit | Move/Del | E.Meta | E.Permis | Owner |
|--|---------|------|------|----------|--------|----------|--------------------------|
| Root | 0 | | | | | | |
| Discussions | 235 | | | | | | |
| Sample Document 1.pdf | 235 | | | | | | |
| Document Library | 42 | | | | | | Claroments Administrator |
| Certificates | 42 | | | | | | Claroments Administrator |
| Demo User Documents | 47 | | | | | | Claroments Administrator |
| Human Resources | 154 | | | | | | Claroments Administrator |
| Marketing | 156 | | | | | | Claroments Administrator |
| Projects | 42 | | | | | | Michael Hassman |
| Sales | 158 | | | | | | Claroments Administrator |
| Templates | 42 | | | | | | Claroments Administrator |
| User Guides | 42 | | | | | | Claroments Administrator |
| Videos | 42 | | | | | | Claroments Administrator |
| Using an Agile Approach in a Large, T... | 42 | | | | | | Claroments Administrator |
| Drop Zone | 164 | | | | | | Michael Christian |

Documents reports

Add any users who are not administrators into the permissions box to give them access rights to run document reports and view them.

Admin / Documents / Documents reports

Reports

Summary workflow reports

Workflow reports

Number/size of documents and electronic records by record type

Detailed report on documents and folders structure

Number and location of folders, documents and records by specific access control markings

Report by review date

Rights to view reports

Start typing to add...

Browse

Remove

User: Alan Metcalfe

View matching users...

Apply permissions

Please note: This does mean they will see content in the report results that they do not have front-end or admin permissions to see usually. If it's not suitable, do not include those users and give them these extra rights.

Summary workflow report

Only applicable if [document workflows](#) are in use on your site.

This will generate a list of each workflow in use and the total number of processed documents.

Admin / Documents / Documents reports / Summary workflow reports

Workflow Documents

-Any workflow-

Created

☐ From

☐ To

Last Modified

☐ From

☐ To

CSV delimiter

☒ Comma (,)

☐ Semicolon (;)

Get CSV file

View

| Workflow | Processed documents |
|----------|---------------------|
| Test1 | 1 |

Workflow report

Only applicable if [document workflows](#) are in use on your site.

This will generate a list of every action made across all workflows with timestamps.

Admin / Documents / Documents reports / Workflow reports

Workflow Documents

-Any workflow-

Created

From

To

Last Modified

From

To

CSV delimiter

Comma (,)

Semicolon (;)

Get CSV file

View

| Workflow | Date/Time | User name | Document | Status From | Action | Status To | Comment |
|----------|------------------|---------------------------|---|--------------|---------|--------------|---|
| Test1 | 21-09-2023 12:21 | Claromentis Administrator | Sample Document 101.pdf | Ratification | confirm | Ratification | Document has been assigned to the State |

Number/size of documents and electronic records by record type

This will generate the number of files within a folder and the size overall.

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 [here](#).

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

Select folder

Document Library

Choose folder

Unset

Created

From

To

Last Modified

From

30-12-2014

00:00

To

User list

Start typing to add...

Browse

Remove

View matching users...

CSV delimiter

Comma (,)

Semicolon (;)

Get CSV file

View

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

e.g.

Click in the "Select folder" field and a pop-up will appear in 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.

Detailed report on documents and folder structure

This generates a list of the contents of a folder including the various information such as the date it was created, when it was last accessed and how many versions there have been.

Admin / Documents / Documents reports / Detailed report on documents and folders structure

Select folder: **Document Library** Choose folder Unset

Created ☒ From 01-12-2014 00:00 To

Last Modified ☐ From To

User list: Start typing to add... Browse Remove

View matching users...

CSV delimiter: ☒ Comma (,) ☐ Semicolon (;) Get CSV file ☒ 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 |

Number and location of folders, documents and records by specific access control markings

This generates a list of documents, showing their location and access control levels.

If your company deals with secure information, you can make use of access [control markings](#) to mark documents as 'Restricted', 'Secret', 'Top Secret' and so on.

This needs to be turned on first to be used on a site, please see the guide linked above for more information.

Admin / Documents / Documents reports / Number and location of folders, documents and records by specific access control markings

Select folder: **Document Library** Choose folder Unset

Listing of: Records / Documents

Access Control Level: From **Unclassified** To **Top Secret**

Created ☐ From To

Last Modified ☐ From To

User list: Start typing to add... Browse Remove

View matching users...

CSV delimiter: ☒ Comma (,) ☐ Semicolon (;) Get CSV file

View

| User name | Folder | Document | Access Control Level |
|---------------------------|---------------------|-----------------------|----------------------|
| Claromantis Administrator | Demo User Documents | Sample Document 2.pdf | Unclassified |
| Claromantis Administrator | Demo User Documents | Sample Document 3.pdf | Unclassified |
| Claromantis Administrator | Demo User Documents | Sample Document 4.pdf | Unclassified |
| Claromantis Administrator | Demo User Documents | Sample Document 5.pdf | Unclassified |
| Claromantis Administrator | Demo User Documents | Sample Document 7.pdf | Unclassified |

Review date

This generates a list of documents showing their creation, last modified, and review dates. This is useful if your business has a policy to ensure checks are made that review dates are not missed, and that all documents remain relevant.

Your team can set a review date per document when they are uploaded or from the admin side at any time.

Download the CSV file to keep as a reference or to easily distribute it in your company.

claromentis

What are you looking for?

16:36

132

HOMECOMPANYDEPARTMENT▼FORMS▼LEARNINGPROJECTS

LEARN MOREBOOK A PERSONALISED DEMO

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 |

Reports From the Front End of Documents

The 'right to view reports' permission gives rights to any users entered to access reports from the front end of documents and the images below show how this appears.

claromentis

What are you looking for?

11:58

132

HOMECOMPANYDEPARTMENT▼FORMS▼LEARNINGPROJECTS

LEARN MOREBOOK A PERSONALISED DEMO

Documents / Document Library / Demo User Documents

Filter the current folder

more

Parent folder

Sample Document 10.pdf

Sample Document 11.pdf

Sample Document 12.pdf

Sample Document 2.pdf

Sample Document 3.pdf

Sample Document 4.pdf

Sample Document 5.pdf

Sample Document 6.pdf

Sample Document 7.pdf

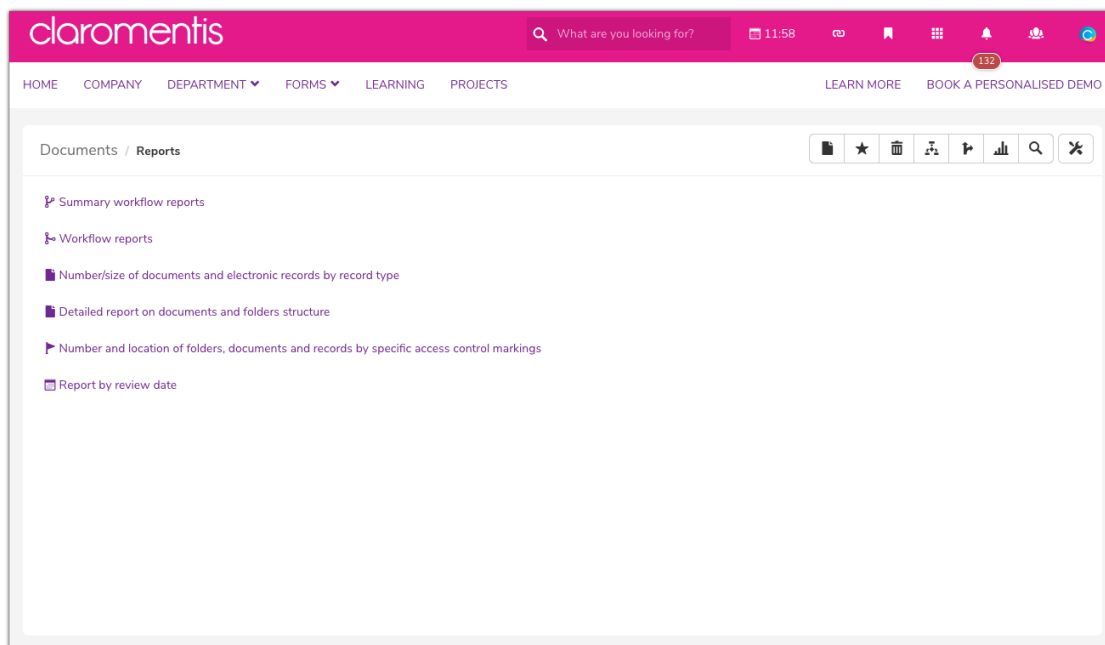
Sample Document 8.pdf

Sample Document 9.pdf

This is a google document

This is a OneDrive document shortcut

Documents report icon (will be hidden if user does not have permissions to view set from the admin side)



Related Article

[Documents Admin](#)

Created on 21 January 2019 by [Hannah Door](#). Last modified on 30 November 2023

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