



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' interface. The interface is divided into several sections. On the left, there's a sidebar with 'ERMS features' and 'Statistics'. The 'ERMS features' section has a list of toggle switches for various features like 'Use ERMS records', 'Use ERMS markers', etc. The 'Statistics' section shows a table with document statistics. The main content area on the right is titled 'Documents' and contains a list of links for 'Manage documents list', 'Documents import', 'Documents export', 'Trash can', 'Documents reports', and 'Documents permissions report'. The 'Documents reports' and 'Documents permissions report' links are highlighted with a red box. Below this is a 'Configuration' section with links for 'General configuration', 'Metadata', 'Record types', 'Templates', and 'Google authentication'.

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

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	✖	✖	✖	✖	✖	
Sample Document 1.pdf	235	✖	✖	✖	✖	✖	
Document Library	42	✔	✔	✔	✔	✔	Claromentis Administrator
Certificates	42	✔	✔	✔	✔	✔	Claromentis Administrator
Demo User Documents	47	✔	✔	✔	✔	✔	Claromentis Administrator
Human Resources	154	✔	✔	✔	✔	✔	Claromentis Administrator
Marketing	156	✔	✔	✔	✔	✔	Claromentis Administrator
Projects	42	✔	✔	✔	✔	✔	Michael Hassman
Sales	158	✔	✔	✔	✔	✔	Claromentis Administrator
Templates	42	✔	✔	✔	✔	✔	Claromentis Administrator
User Guides	42	✔	✔	✔	✔	✔	Claromentis Administrator
Videos	42	✔	✔	✔	✔	✔	Claromentis Administrator
Using an Agile Approach in a Large, T...	42	✔	✔	✔	✔	✔	Claromentis 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 (,)

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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

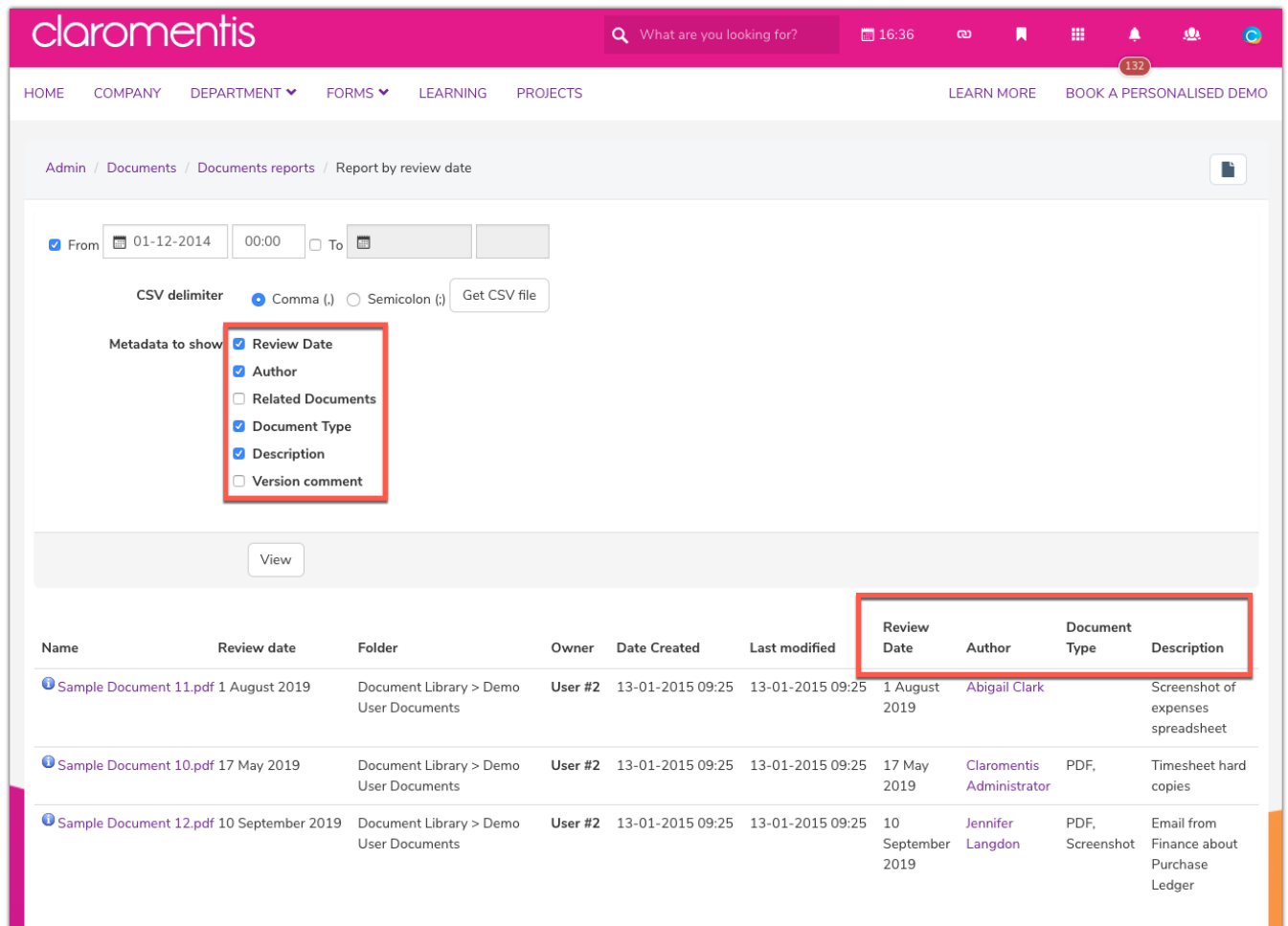
User name	Folder	Document	Access Control Level
Claromentis Administrator	Demo User Documents	Sample Document 2.pdf	Unclassified
Claromentis Administrator	Demo User Documents	Sample Document 3.pdf	Unclassified
Claromentis Administrator	Demo User Documents	Sample Document 4.pdf	Unclassified
Claromentis Administrator	Demo User Documents	Sample Document 5.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.



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What are you looking for?

16:36

132

HOME COMPANY DEPARTMENT ▼ FORMS ▼ LEARNING PROJECTS

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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.

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11:58

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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)

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11:58

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Documents / Reports

★

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Related Article

[Documents Admin](#)

