



Document Reports

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 Applications > 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' configuration page. The left sidebar shows a menu with 'DOCUMENTS' (Manage documents list), 'UTILITIES' (Documents import, Documents export, Trash can), and 'CONFIGURATION' (General configuration). The 'Documents reports' option is highlighted with a red box. The main content area is titled 'ERMS features' and contains a list of toggle switches for various ERMS configurations. At the bottom, there is a 'Statistics' section with a table showing the 'Number of Documents' as 55.

ERMS features	Toggle	Feature Name
Use ERMS records	Off	(ERMS_CONFIG_RECORD)
Use ERMS markers	Off	(ERMS_CONFIG_MARKERS)
Use record types	On	(ERMS_CONFIG_RECORD_TYPES)
Use multi-component documents	Off	(ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
Use 'security levels' in permission system	On	(ERMS_CONFIG_SECURITY_LEVEL)
Use MD5 signature for documents	On	(ERMS_CONFIG_MD5_SIGNATURE)
Use export/import for ERMS objects	Off	(ERMS_CONFIG_EXPORT_IMPORT)
Use ERMS schedules	Off	(ERMS_CONFIG_SCHEDULE)
Use Google drive links	On	(ERMS_CONFIG_GDOC_LINKS)
Use Microsoft OneDrive links	On	(ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics	Value
Number of Documents	55

Document permissions report

Applications > Admin > Documents > Documents 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. (The ticket means they have those permissions, and the dash means they do not)

Admin > Documents > Documents permissions report

User: Abigail ...

CSV report: Folders Documents

CSV delimiter: Comma (,) Semicolon (;)

Name	perm_id	View	Edit	Move/Del	E.Meta	E.Perms	Owner
Root	0	⊖	⊖	⊖	⊖	⊖	
Discussions	235	⊖	⊖	⊖	⊖	⊖	
Document Library	42	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator
Certificates	42	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator
Demo User Documents	42	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator
Human Resources	154	⊖	⊖	⊖	⊖	⊖	Claromentis Administrator
Marketing	156	⊖	⊖	⊖	⊖	⊖	Claromentis Administrator
Projects	42	⊙	⊙	⊙	⊙	⊖	Michael Hassman
Sales	158	⊖	⊖	⊖	⊖	⊖	Claromentis Administrator
password_test.pdf	42	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator
Drop Zone	164	⊙	⊙	⊙	⊖	⊖	Michael Christian
Sales	397	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator
Support and Maintenance Documents	388	⊙	⊙	⊙	⊙	⊖	Claromentis Administrator

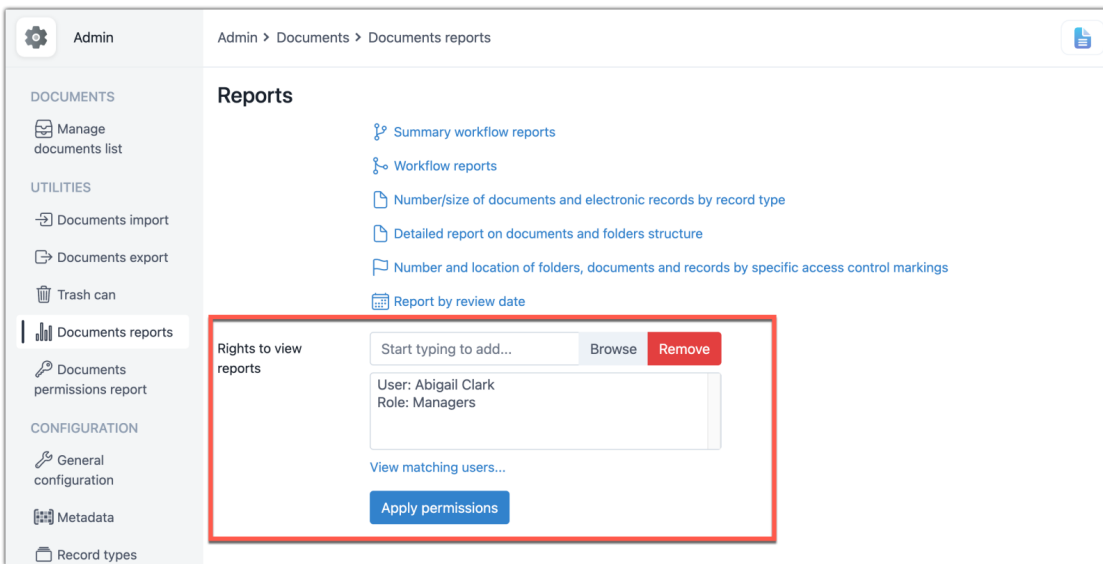
Expand folders to view the user's permissions on the screen, or download the data to a CSV for easier searching and to see all nested content included. e.g.

Name: Abigail Clark											
ID	LEVEL	TYPE	PATH	NAME	DESC	perm_id	VIEW	EDIT	MOVE/DEL	E.META	E.PERMS
27	0	Folder	Root	Discussions		235	No	No	No	No	No
5	0	Folder	Root	Document Library		42	Yes	Yes	Yes	Yes	No
24	0	Folder	Root	Drop Zone	Document Drop Zone	164	Yes	Yes	Yes	No	No
100	0	Folder	Root	Sales		397	Yes	Yes	Yes	Yes	No
97	0	Folder	Root	Support and Maintenance Documents		388	Yes	Yes	Yes	Yes	No
125	1	File	Root>Discussions	Sample Document 1.pdf		235	No	No	No	No	No
96	1	Folder	Root>Document Library	Certificates		42	Yes	Yes	Yes	Yes	No
6	1	Folder	Root>Document Library	Demo User Documents	Demo users can uploa	42	Yes	Yes	Yes	Yes	No
15	1	Folder	Root>Document Library	Human Resources		154	No	No	No	No	No
11	1	Folder	Root>Document Library	Marketing		156	No	No	No	No	No
30	1	Folder	Root>Document Library	Projects		42	Yes	Yes	Yes	Yes	No
16	1	Folder	Root>Document Library	Sales		158	No	No	No	No	No
217	1	File	Root>Document Library	password_test.pdf		42	Yes	Yes	Yes	Yes	No
44	1	Folder	Root>Drop Zone	Templates	Document Drop Zone	164	Yes	Yes	Yes	No	No
18	1	Folder	Root>Drop Zone	Videos	Document Drop Zone	164	Yes	Yes	Yes	No	No
208	1	File	Root>Drop Zone	Sample Document 12.pdf		164	Yes	Yes	Yes	No	No
138	1	File	Root>Drop Zone	This is a test.ppsx		164	Yes	Yes	Yes	No	No
98	1	Folder	Root>Sales	Old Sales Documents		397	Yes	Yes	Yes	Yes	No
99	1	Folder	Root>Sales	Recent Sales Documents		397	Yes	Yes	Yes	Yes	No

Documents reports

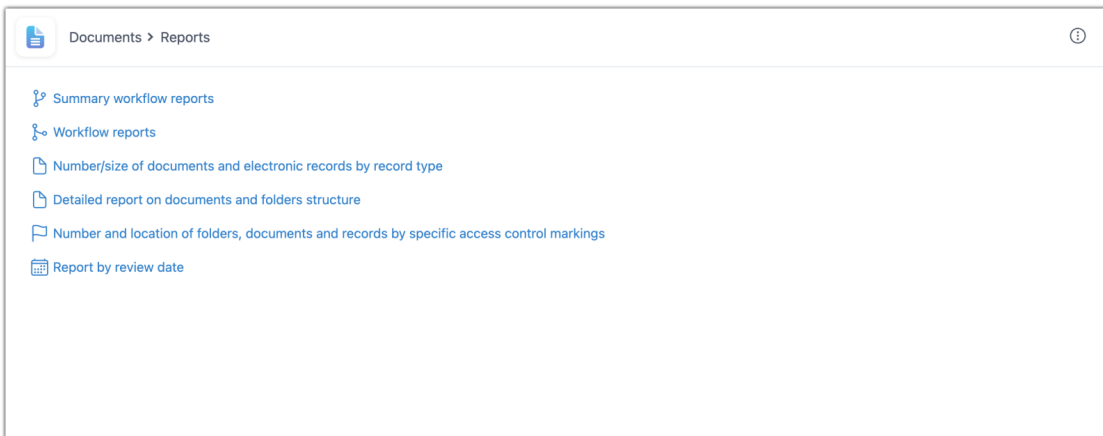
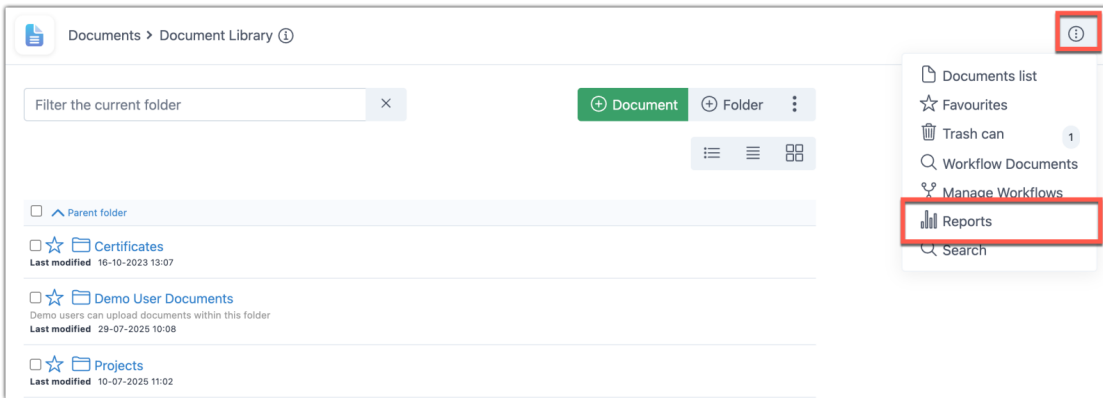
Applications > Admin > Documents > Documents reports

Add any users who should also be able to run reports but who cannot be application administrators into the permissions box to give them this ability (and not full administrator access):



Please note: All files will be included in reports regardless of the front-end permissions a user has, so only give users report permissions if it is appropriate for them to see all files.

Once given this extra permission, users will be able to see the reports option from the front end of Documents:



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
All 3 heads to approve	2
Move out files older than 6 months	0

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
All 3 heads to approve	11-07-2025 12:22	Abigail Clark	Sample Document 3.pdf	Unapproved	confirm	Unapproved	Document has been assigned to the State
All 3 heads to approve	11-07-2025 14:58		Sample Document 3.pdf	Unapproved	confirm	Approved	Approval based transition

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 To

User list: Browse Remove

[View matching users...](#)

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

View

Record type	Number of documents	Documents size
Record Type not set	47	14.94 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: Choose folder Unset

Created: From To

Last Modified: From To

User list: 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
	Videos		05-05-2015 17:45	19-02-2025 09:35			Drop Zone
	The New Age of Work_ A Digital Workspace For All Your Needs.mp4	9135113	19-02-2025 09:35	19-02-2025 09:35	10-07-2025 11:11	1	Videos
	Drop Zone		08-05-2015 16:45	10-07-2025 11:11			
	This is a test.ppsx	33431	13-06-2017 11:30	13-06-2017 11:30	10-07-2025 14:10	1	Drop Zone
	Sample Document 12.pdf	0	10-07-2025 09:23	10-07-2025 09:23	10-07-2025 09:23	1	Drop Zone
	Templates		27-10-2017 14:32	27-10-2017 14:39			Drop Zone
	Application Approved		27-10-2017 14:38	27-10-2017 14:38			Templates
	Application Approved template.docx	12275	27-10-2017 14:33	27-10-2017 14:33	10-07-2025 11:11	1	Application Approved

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 [security levels](#) 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: Drop Zone [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	Drop Zone	This is a test.ppsx	Unclassified
Claromentis Administrator	Application Declined	Application Declined template.docx	Unclassified
Claromentis Administrator	Application Approved	Application Approved template.docx	Unclassified
Claromentis Administrator	Videos	The New Age of Work_ A Digital Workspace For All Your Needs.mp4	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.

Admin > Documents > Documents reports > Report by review date

From 01-01-2014 00:00 To

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

Metadata to show: Review Date Author Related Documents Description Version comment

[View]

Name	Review date	Folder	Owner	Date Created	Last modified	Review Date	Author
Sample Document 10.pdf	11 September 2025	Document Library > Demo User Documents	Claromentis Administrator	13-01-2015 09:25	31-07-2025 11:40	11 September 2025	Abigail Clark
Sample Document 7.pdf	1 October 2025	Document Library > Demo User Documents	Claromentis Administrator	13-01-2015 09:25	31-07-2025 11:41	1 October 2025	Alan Metcalfe

Related Article

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