



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 page is divided into several sections. On the left, there are 'ERMS features' with a list of toggle switches and their corresponding configuration keys. Below that is a 'Statistics' table. On the right, there are 'Documents' and 'Utilities' sections with various links. The 'Documents reports' link is highlighted with a red box.

ERMS features	Configuration Key
<input type="checkbox"/> Use ERMS records	ERMS_CONFIG_RECORD
<input type="checkbox"/> Use ERMS markers	ERMS_CONFIG_MARKERS
<input type="checkbox"/> Use record types	ERMS_CONFIG_RECORD_TYPES
<input type="checkbox"/> Use multi-component documents	ERMS_CONFIG_MULTICOMPONENT_DOCUMENT
<input type="checkbox"/> Use 'security levels' in permission system	ERMS_CONFIG_SECURITY_LEVEL
<input type="checkbox"/> Use MD5 signature for documents	ERMS_CONFIG_MD5_SIGNATURE
<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

Statistics	Value
Number of Documents	90
Number of all versions of documents	95
Number of checked out documents	0
Total space occupied by documents	403.13 Mb
Number of deleted documents and folders	0
Size of deleted documents	0 Bytes

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

CSV report: Folders Documents

CSV delimiter: Comma (,) Semicolon (;)

Root

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

User: Alan Metcalfe

View matching users...

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:

Created: From To

Last Modified: From To

CSV delimiter: Comma (,) Semicolon (;)

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:

Created: From To

Last Modified: From To

CSV delimiter: Comma (,) Semicolon (;)

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:

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

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
Claromentis 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.

The screenshot shows the 'Report by review date' interface in the Claromentis system. The interface includes a search bar, navigation menu, and a form for generating a report. The 'Metadata to show' section has checkboxes for 'Review Date', 'Author', 'Document Type', and 'Description', all of which are checked. Below the form is a table with columns for Name, Review date, Folder, Owner, Date Created, Last modified, Review Date, Author, Document Type, and Description. The table contains three rows of sample documents.

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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What are you looking for? 11:58

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Documents / Document Library / Demo User Documents

Filter the current folder

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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Related Article

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