Document Reports

Introduction

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

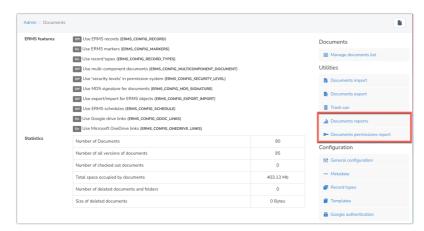There is an option to allow other users to run the reports from the front end who are not administrators.

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.

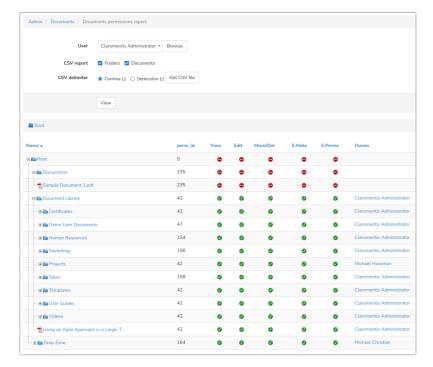- The rest of the area is explained in detail in this guide.

There are 4 main reports available in two tabs.
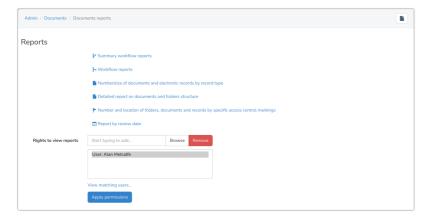

Document permissions report

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

📁 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 | Start typing to add... | Browse | Remove |

User: Alan Metcalfe

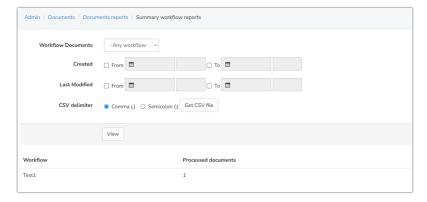View matching users...

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

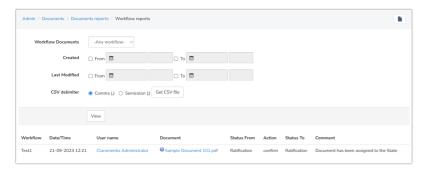Only applicable if document workflows are in use on your site.

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.

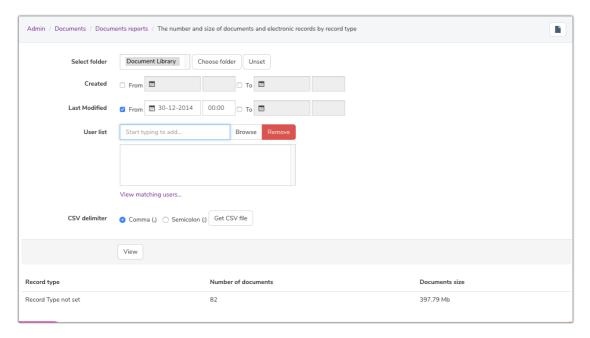This will generate a list of every action made across all workflows with timestamps.

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.

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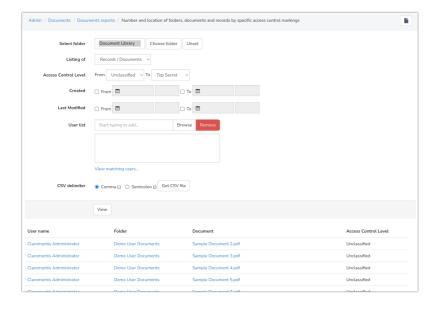
Number and location of folders, documents and records by specific access control markings

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.

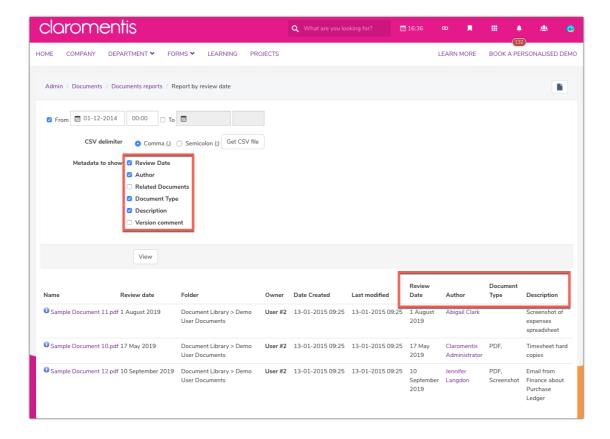This needs to be turned on first to be used on a site, please see the guide linked above for more information.

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.
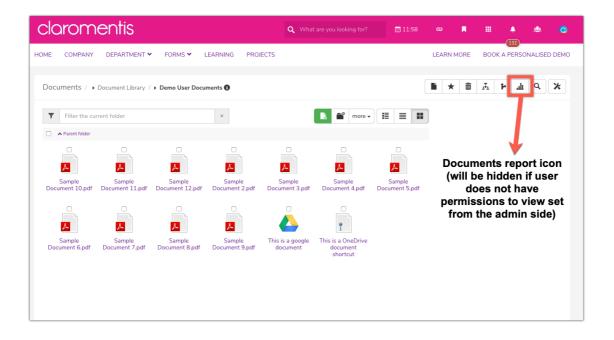
Your team can set a review date per document when they are uploaded or from the admin side at any time.
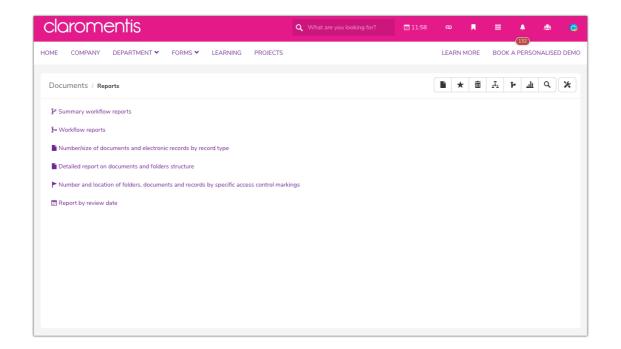
Download the CSV file to keep as a reference or to easily distribute it in your company.

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.

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

Related Article

Documents Admin

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Tags: documents, intranet, user guide, report