

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.

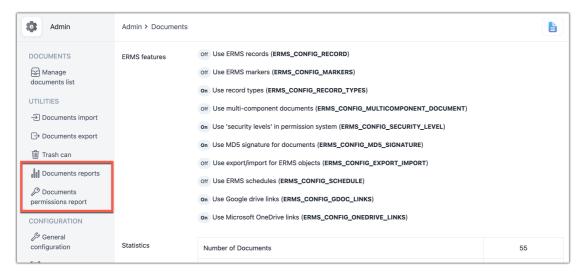
Each report can be exported to a CSV file for further analysis in other programs or to share more easily with others.

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.

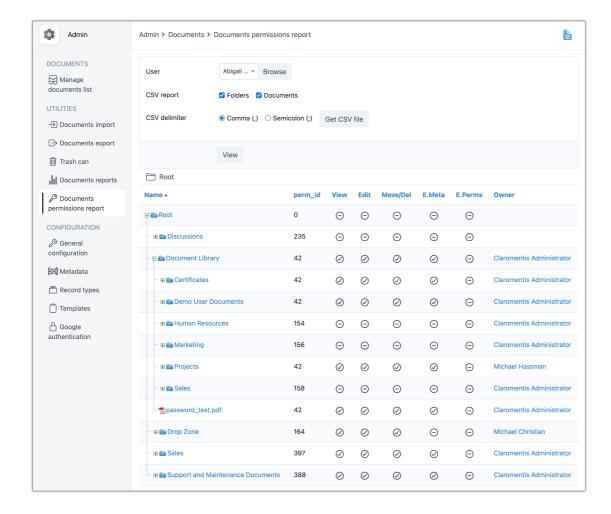


Document permissions report

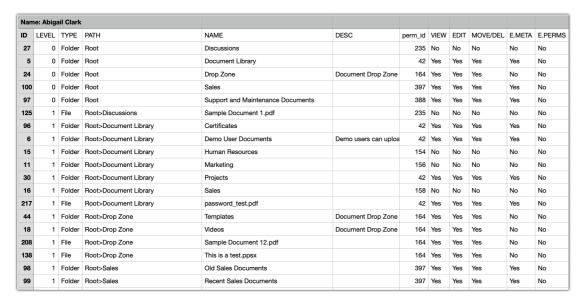
Applications > Admin > Documents > Documents permissions report

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)



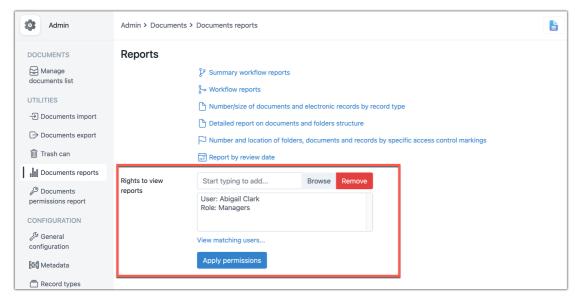
Expand folders to view the user's permissions on the screen, or download the data to a CSV for easier searching and to see all nested content included. e.g.



Documents reports

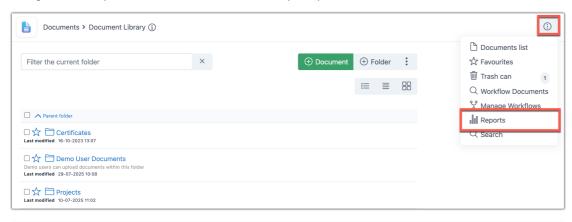
Applications > Admin > Documents > Documents reports

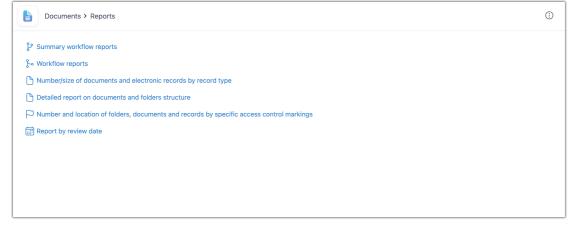
Add any users who should also be able to run reports but who cannot be application administrators into the permissions box to give them this ability (and not full administrator access):



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:

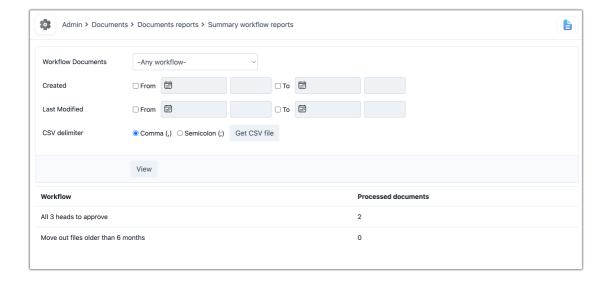




Summary workflow report

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

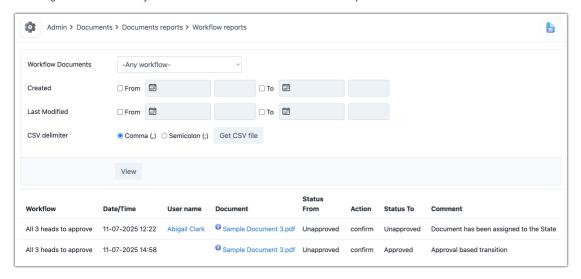
This will generate a list of each workflow in use and the total number of processed documents.



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.



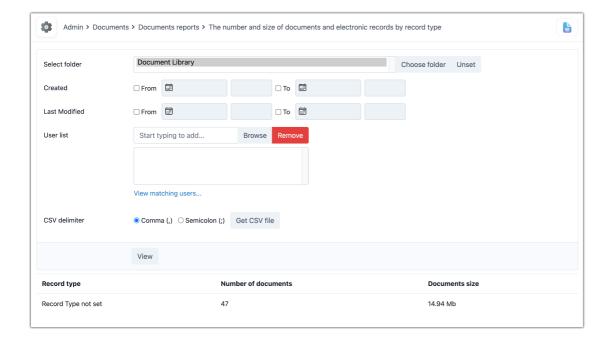
Number/size of documents and electronic records by record type

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 $\ \ \text{here}.$



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.

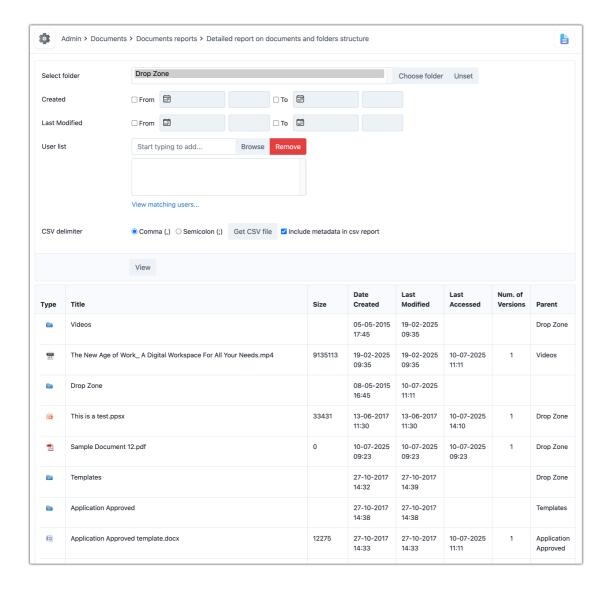
Choose to search for all documents by the date created, last modified or both.

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.

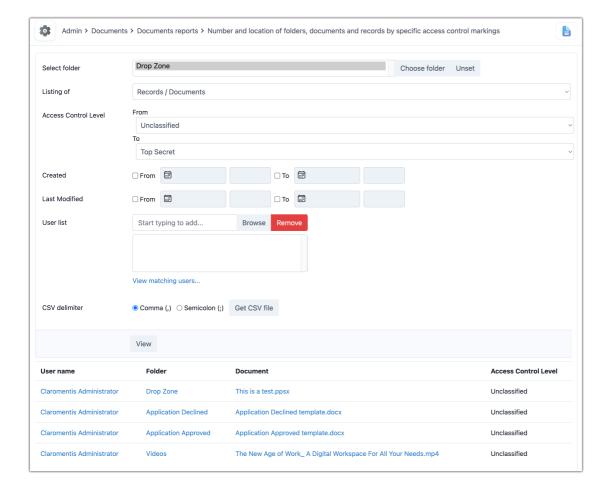


Number and location of folders, documents and records by specific access control markings

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 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.

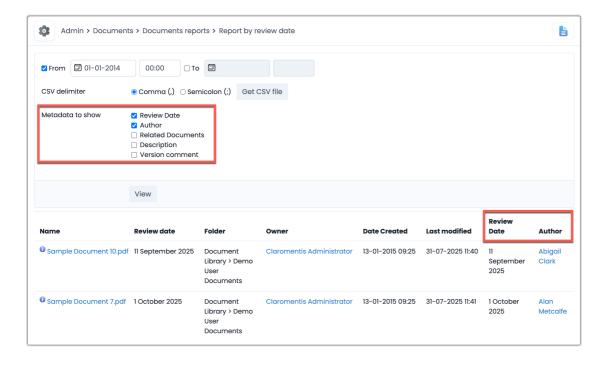


Review date

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.



Related Article

Documents Admin

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