



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.

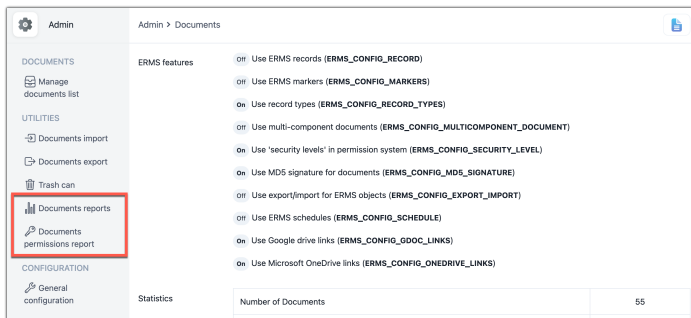
Each report can be exported to a CSV file for further analysis in other programs or to share more easily with others.

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.



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

Manage documents list

UTILITIES

Documents import

Documents export

Trash can

Documents reports

Documents permissions report

CONFIGURATION

General configuration

Metadata

Record types

Templates

Google authentication

Admin > Documents > Documents permissions report

User

Abigail ...

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Root	235	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document Library	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Certificates	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Demo User Documents	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Human Resources	154	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Marketing	156	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Projects	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michael Hassman
Sales	158	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
password_test.pdf	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Drop Zone	164	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michael Christian
Sales	397	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claromentis Administrator
Support and Maintenance Documents	388	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	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 upload	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.pptx		164	Yes	Yes	Yes	No	No
96	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):

Admin

DOCUMENTS

Manage documents list

UTILITIES

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Documents permissions report

CONFIGURATION

General configuration

Metadata

Record types

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

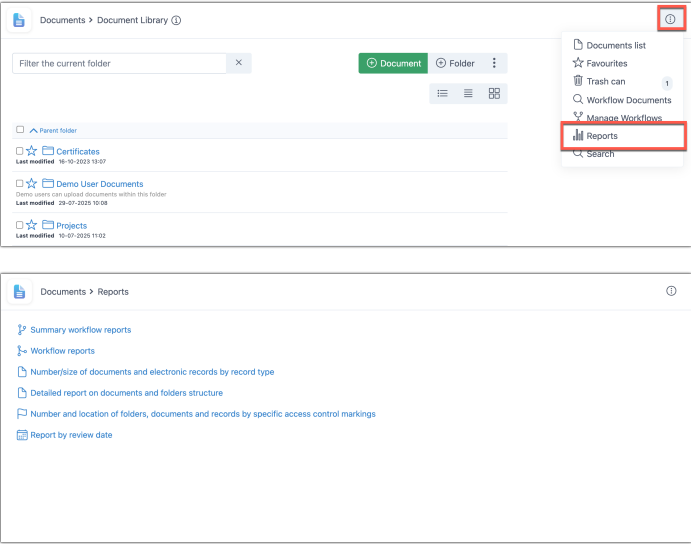
User: Abigail Clark
Role: Managers

View matching users...

Apply permissions

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.

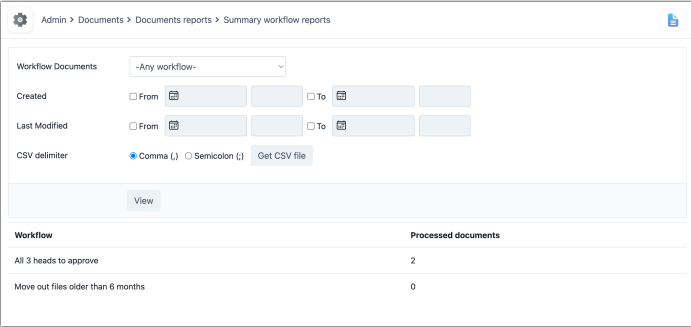
Once given this extra permission, users will be able to see the reports option from the front end of Documents:



Summary workflow report

Only applicable if [document workflows](#) are in use on your site.

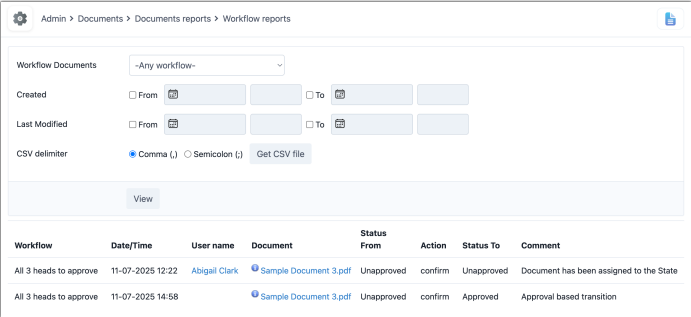
This will generate a list of each workflow in use and the total number of processed documents.



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 [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

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	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

Drop Zone

Choose folder

Unset

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

☒ 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.pptx	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...

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Get CSV file

View

User name	Folder	Document	Access Control Level
Claramentis Administrator	Drop Zone	This is a test.pptx	Unclassified
Claramentis Administrator	Application Declined	Application Declined template.docx	Unclassified
Claramentis Administrator	Application Approved	Application Approved template.docx	Unclassified
Claramentis 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	Claramentis 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	Claramentis Administrator	13-01-2015 09:25	31-07-2025 11:41	1 October 2025	Alan Metcalfe

Related Article

[Documents Admin](#)

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Tags: [documents](#), [intranet](#), [user guide](#), [report](#)