



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' page in a web application. The page is divided into several sections. On the left, there's a 'Statistics' table. In the center, there's a list of 'ERMS features' with toggle switches. On the right, there's a sidebar with links to 'Documents', 'Utilities', and 'Configuration'. The 'Documents reports' link in the 'Utilities' section is highlighted with a red box.

Statistics	
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

ERMS features

- ☐ Use ERMS records (ERMS_CONFIG.RECORD)
- ☐ Use ERMS markers (ERMS_CONFIG.MARKERS)
- ☐ Use record types (ERMS_CONFIG.RECORD_TYPES)
- ☐ Use multi-component documents (ERMS_CONFIG.MULTICOMPONENT_DOCUMENT)
- ☐ Use 'security levels' in permission system (ERMS_CONFIG.SECURITY_LEVEL)
- ☐ Use MD5 signature for documents (ERMS_CONFIG.MD5_SIGNATURE)
- ☐ Use export/import for ERMS objects (ERMS_CONFIG.EXPORT_IMPORT)
- ☐ Use ERMS schedules (ERMS_CONFIG.SCHEDULE)
- ☐ Use Google drive links (ERMS_CONFIG.GDOC_LINKS)
- ☐ Use Microsoft OneDrive links (ERMS_CONFIG.ONEDRIVE_LINKS)

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

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

Claroments Administrator

Browse

CSV report

☒ Folders

☒ Documents

CSV delimiter

☒ Comma (,)

☐ Semicolon (;)

Get CSV file

View

Name	perm_id	View	Edit	Move/Del	E.Meta	E.Perm	Owner
Root	0						
Discussions	235						
Sample Document 1.pdf	235						
Document Library	42						Claroments Administrator
Certificates	42						Claroments Administrator
Demo User Documents	47						Claroments Administrator
Human Resources	154						Claroments Administrator
Marketing	156						Claroments Administrator
Projects	42						Michael Hassman
Sales	158						Claroments Administrator
Templates	42						Claroments Administrator
User Guides	42						Claroments Administrator
Videos	42						Claroments Administrator
Using an Agile Approach in a Large, T...	42						Claroments 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.

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
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

Document Library

Choose folder

Unset

Created

From

To

Last Modified

From

30-12-2014

00:00

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	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
Claromantis Administrator	Demo User Documents	Sample Document 2.pdf	Unclassified
Claromantis Administrator	Demo User Documents	Sample Document 3.pdf	Unclassified
Claromantis Administrator	Demo User Documents	Sample Document 4.pdf	Unclassified
Claromantis Administrator	Demo User Documents	Sample Document 5.pdf	Unclassified
Claromantis 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.

claromentis

What are you looking for?

16:36

132

HOMECOMPANYDEPARTMENT▼FORMS▼LEARNINGPROJECTS
LEARN MOREBOOK A PERSONALISED DEMO

Admin / Documents / Documents reports / Report by review date

From

01-12-2014

00:00

To

CSV delimiter

Comma (,)

Semicolon (;)

Get CSV file

Metadata to show

☒ Review Date
 ☒ Author
 ☐ Related Documents
 ☒ Document Type
 ☒ Description
 ☐ Version comment

View

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

132

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Documents / Document Library / Demo User Documents

Filter the current folder

more

☐ 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

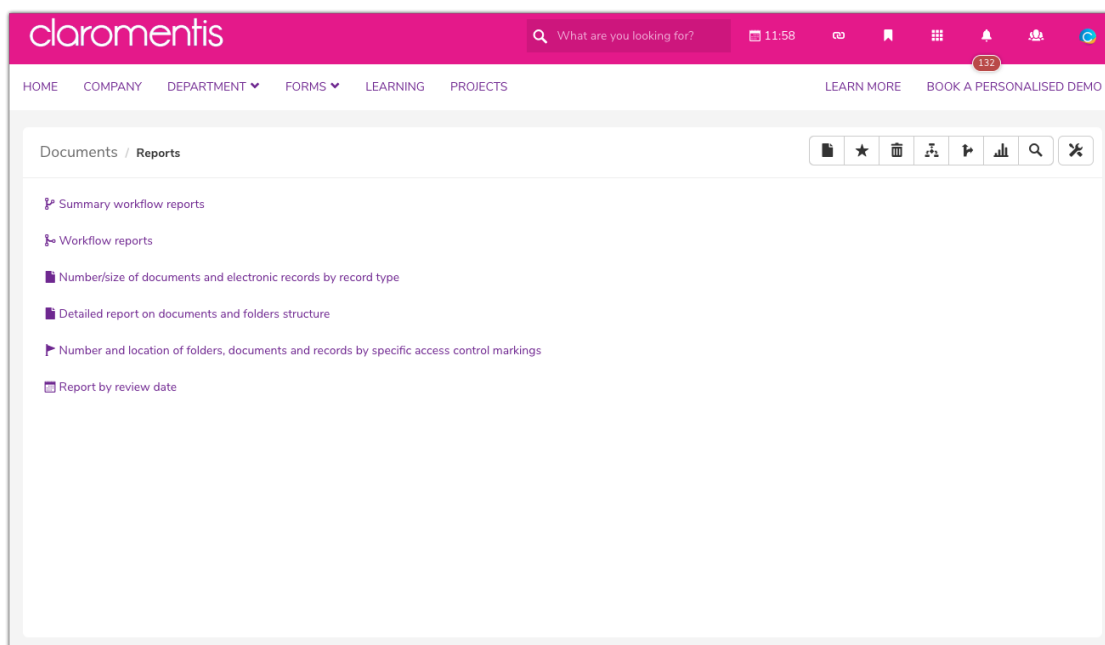
Sample Document 8.pdf

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)



Related Article

[Documents Admin](#)

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