Documents: How to monitor files & folders

Introduction

In Claromentis, our 'Monitor' feature will allow you to stay updated on your files and/or folders. Notifications can be sent out if new files are added, updated, or deleted via the Document application.

How to use the 'monitor' function:

- Monitor folders
- Monitor single documents
- Cancel monitor function
- View folder & document audit log

> **Reminder:** To ensure no updates are missed, check notification preferences are set correctly for the Documents application. For more information on how to set notification preferences, click here.
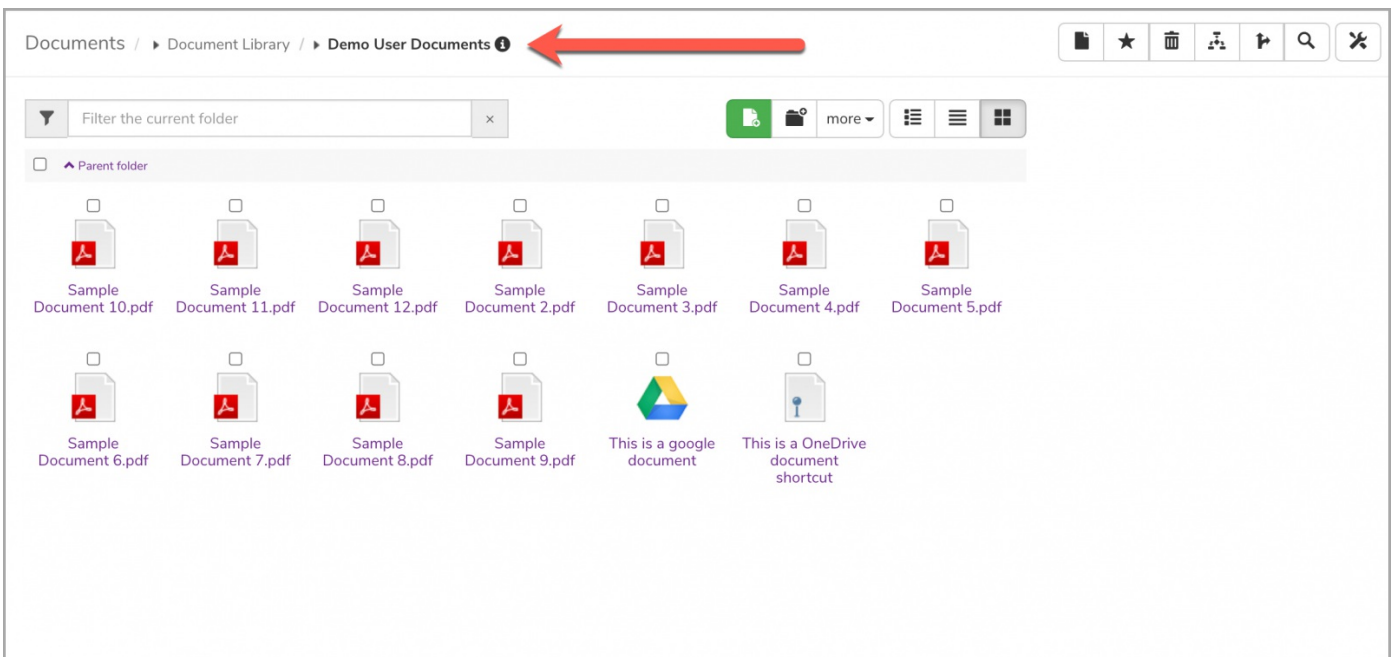
How to monitor folders

When monitoring a folder, any changes within the folder and its sub-folders will generate a notification.

1. Head to the Document folder you would like to monitor for updates.

2. Select '**View Properties**' using (a) the arrow next to the relevant folder or (b) clicking into the folder and selecting the ⓘ icon.
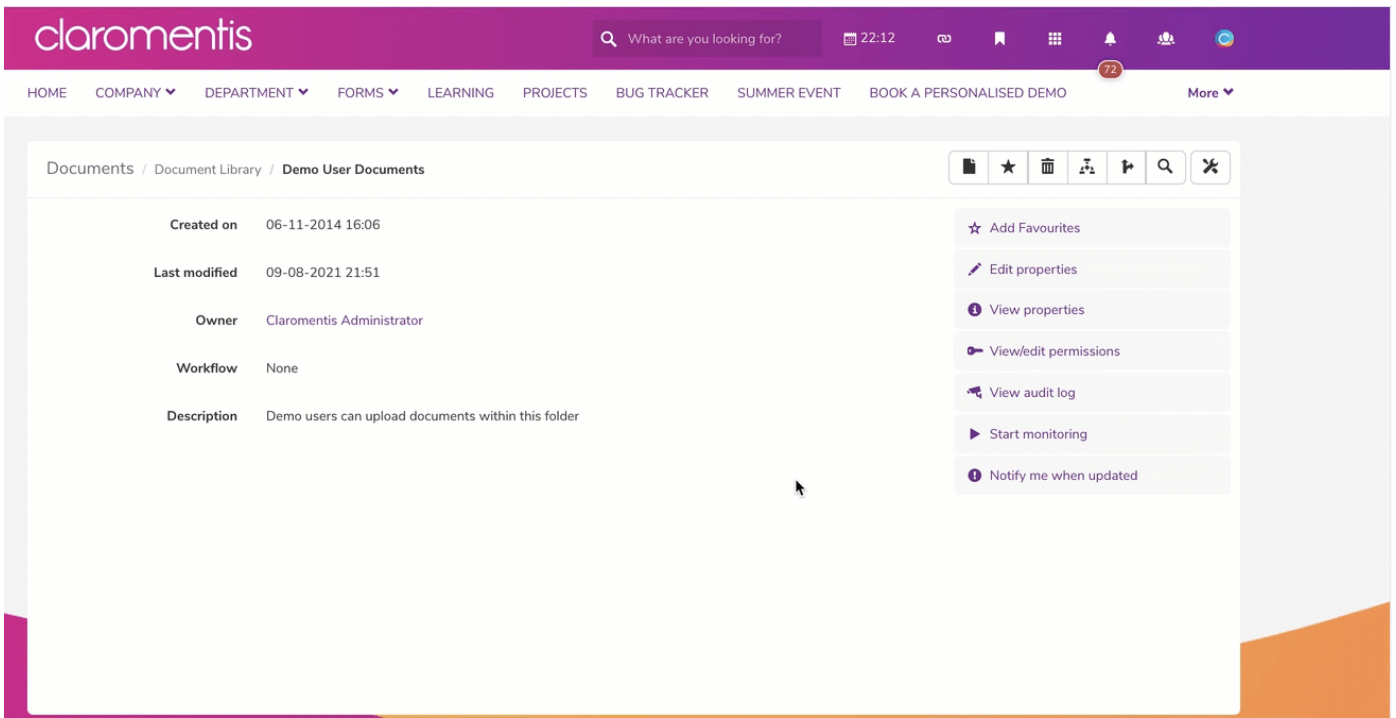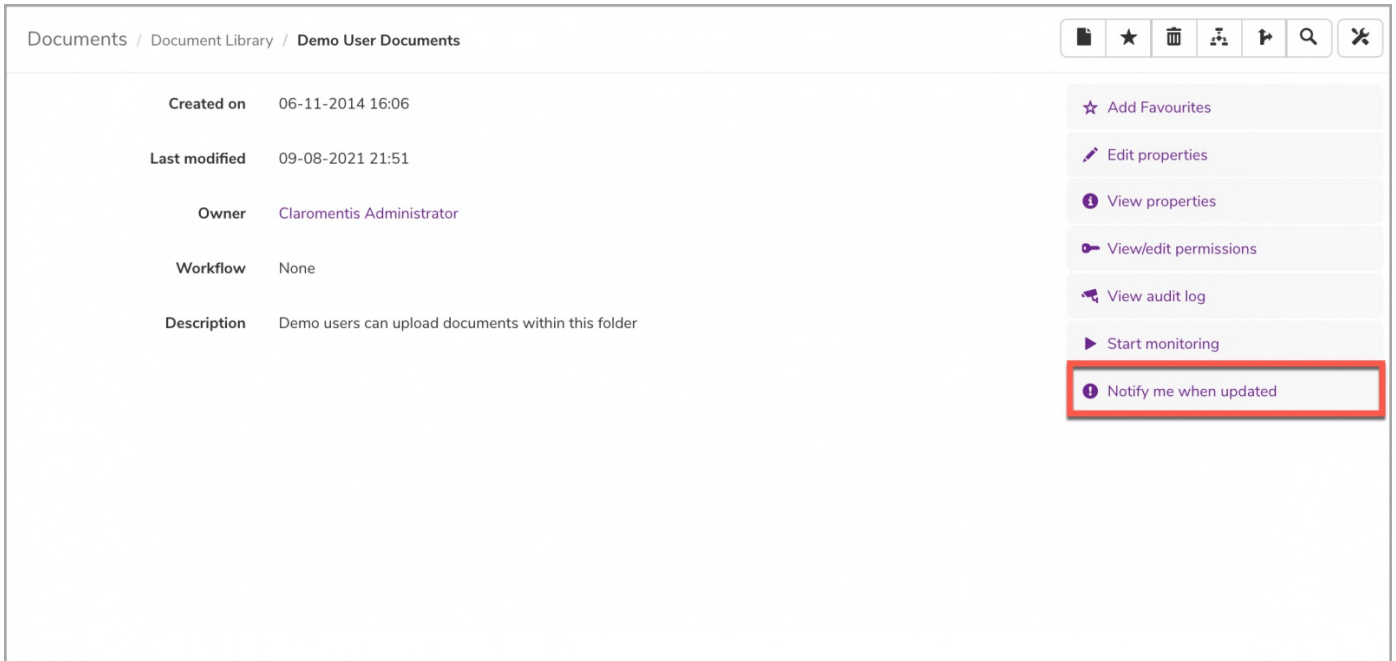
List View
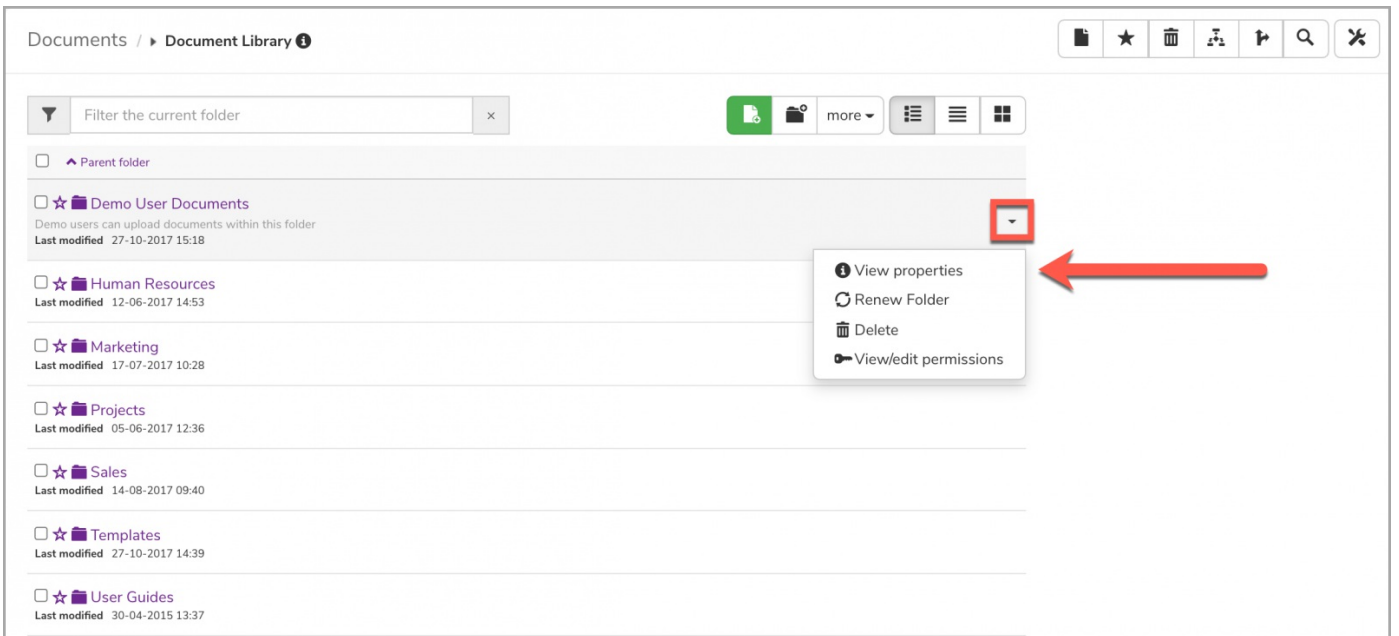
Thumbnail View

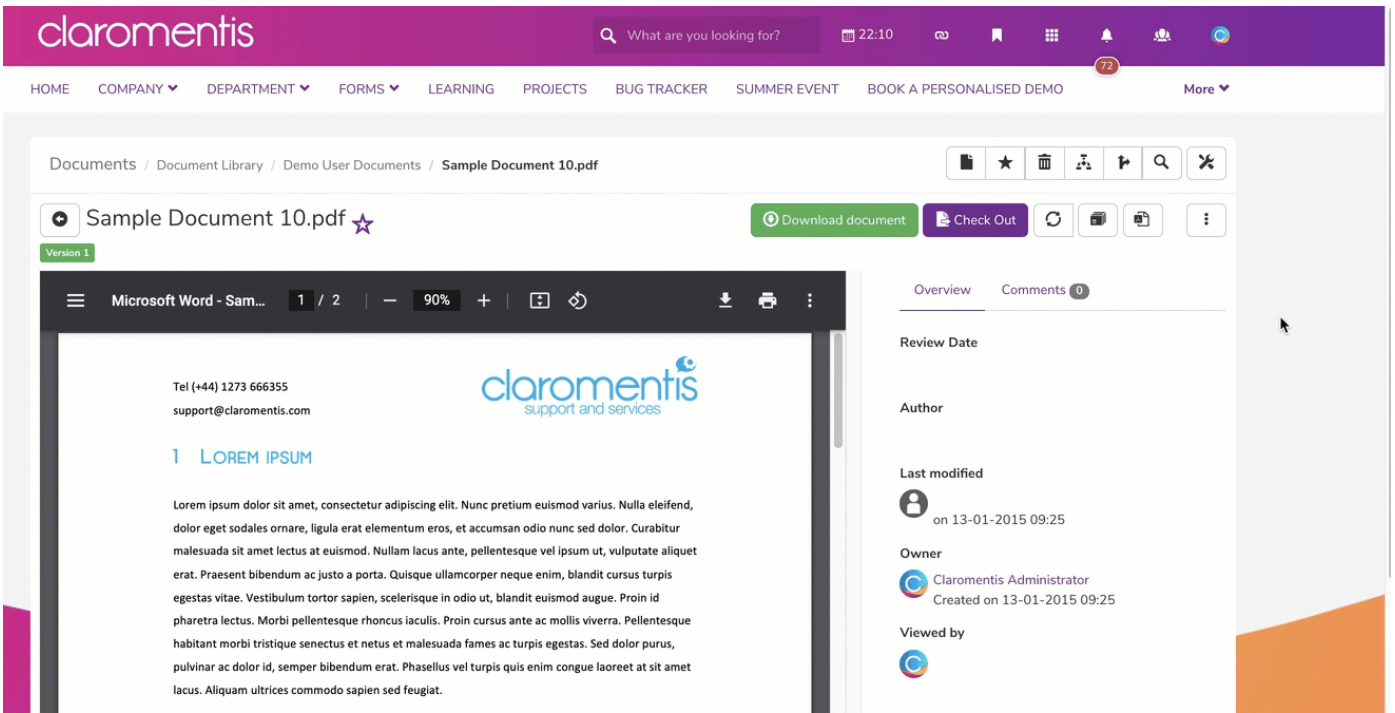

3. Select 'Start Monitoring'

Please note: If you only wish to receive a one-time-only notification about the next change that takes place, choose '**Notify me when updated'**:


How to monitor files

When monitoring a single file, any changes to it will generate a notification.

1. Head straight to the document you would like to monitor for updates.

2. Select '**Start monitoring document'** located in the drop-down menu.

Please note: If you only wish to receive a one-time-only notification about the next change that takes place, choose ' **Notify me when updated'**:
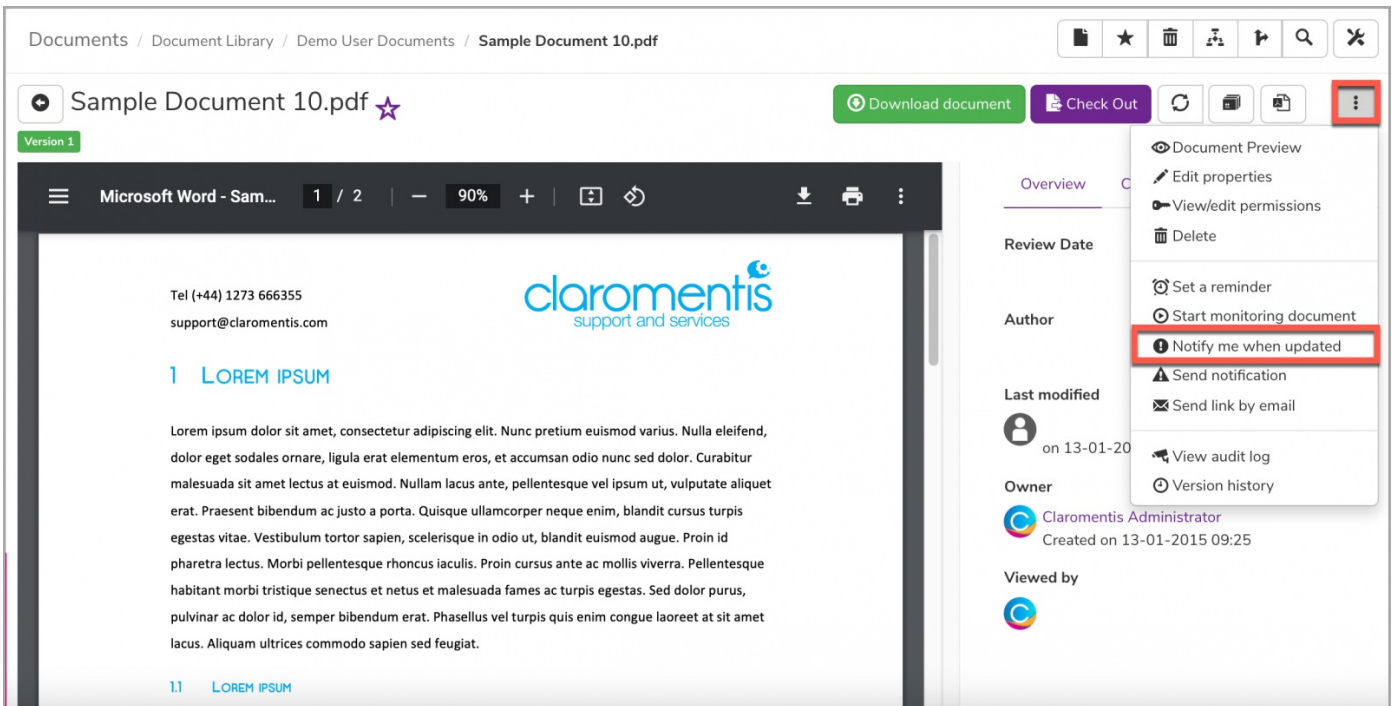
If you wish to send a notification immediately of the current document, select ' **Send notification'**:
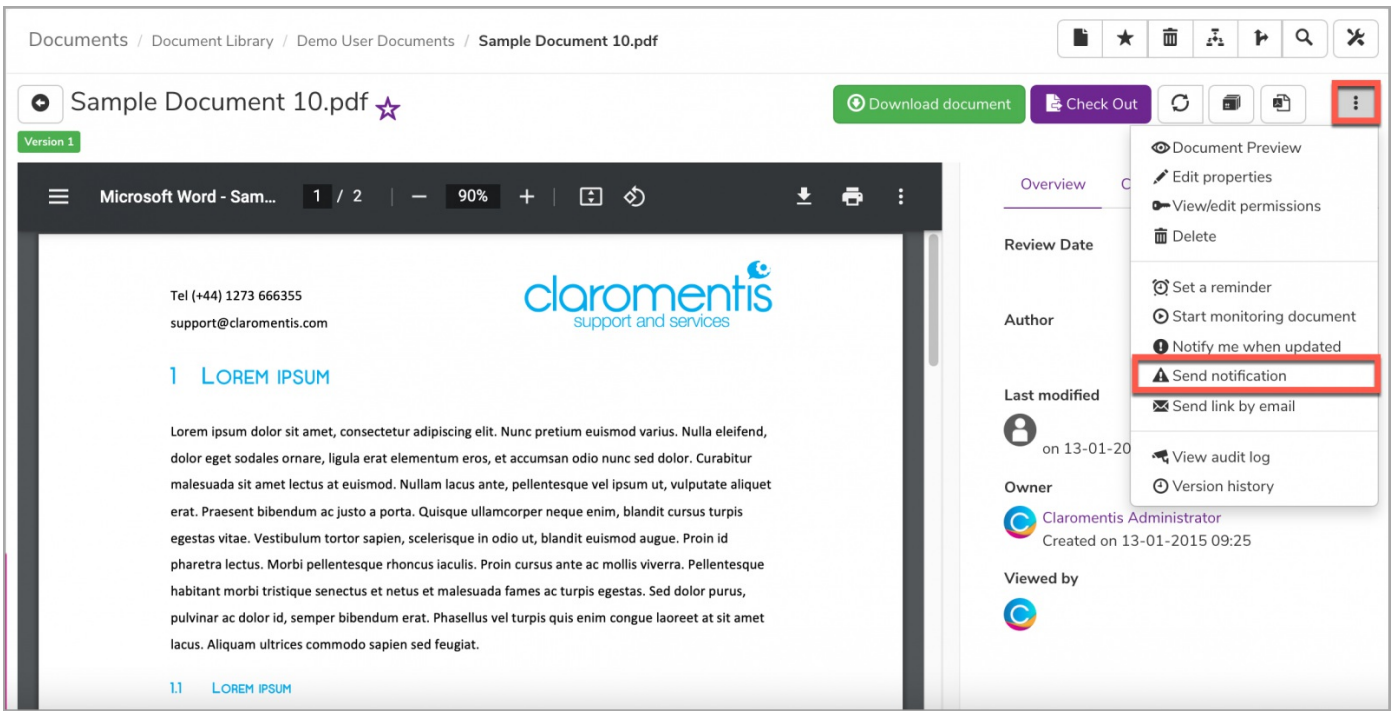
How to cancel monitoring folders & documents

Cancelling the monitor function will stop any notification from being generated.

For folders

1. Head to the Document folder you no longer wish to monitor for updates.

2. Select '**View Properties'** using the arrow next to the relevant folder.
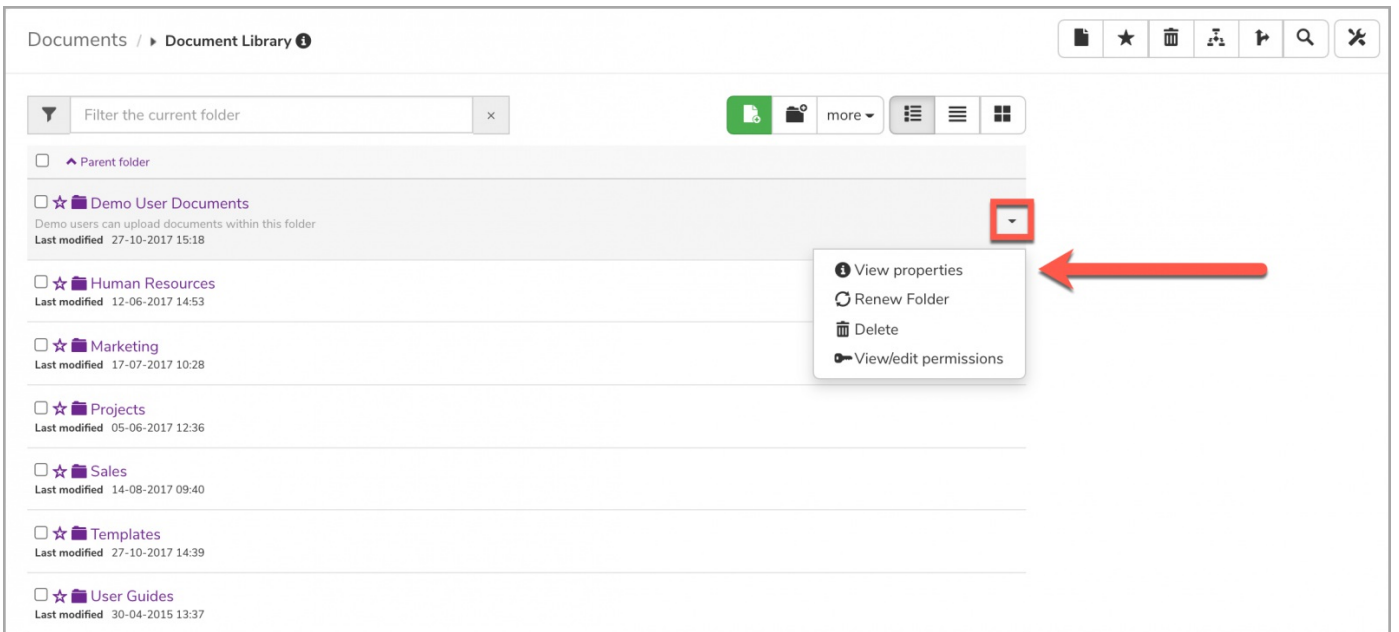
3. Select '**Stop Monitoring'**
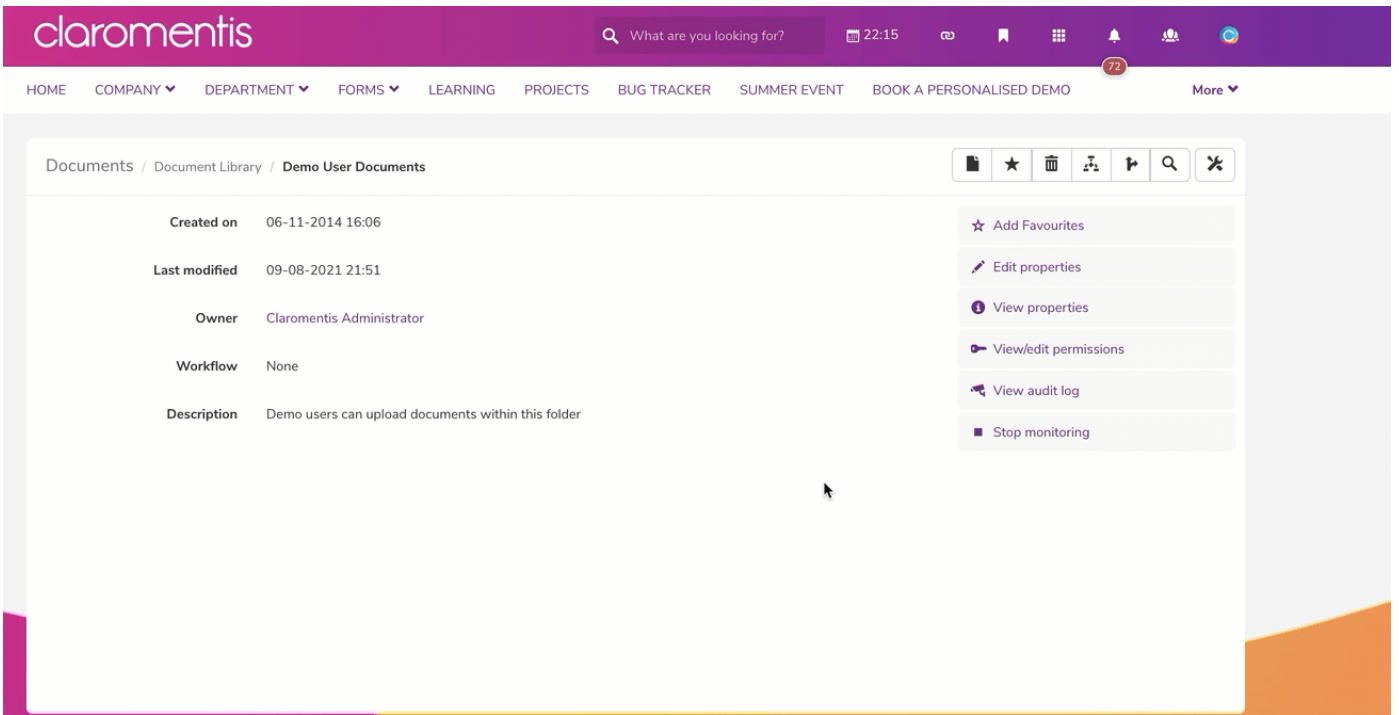
For files

1. Head straight to the document you no longer wish to monitor for updates.

2. Select Select **Stop Monitoring** located on the menu bar.
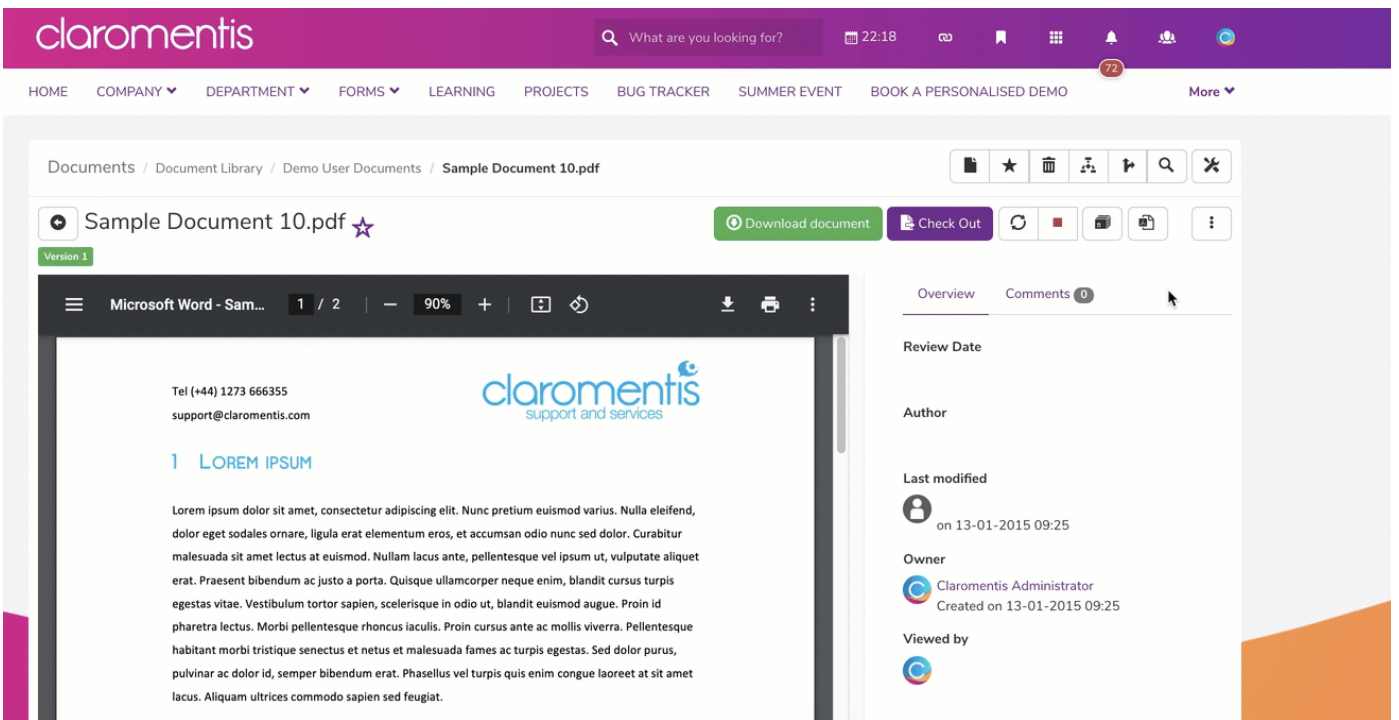
How to view folder & file audit log

Each document will have an audit log that can be generated if you ever need a record of changes made. This can be a useful alternative if you do not wish to monitor every folder.

For folders

1. Head to the Document folder.

2. Select '**View Properties'** using the arrow next to the relevant folder.

3. Select **View audit log**.

4. **Optional:** Export the audit log as a CSV if needed.

For Files

1. Head straight to the document.

2. Select '**View audit log'** located in the drop-down menu.

3. **Optional:** Export the audit log as a CSV if needed.