



Document Preview

Configuration

By default, opening a document from the front end of the application will load the preview page.

There is a configuration option in **Admin > Documents > General Configuration** which offers an alternative.

Open document details from the documents list

Whether to open document details (with preview) or the document itself when user clicks document name. If set to No, clicking document title in the documents list will open the actual document (download)

☒ Yes ☐ No

An application administrator of Documents can change this open to 'No' which means when files are opened the preview page is not seen and the file is simply downloaded instead (and the user can open the file locally to view it)

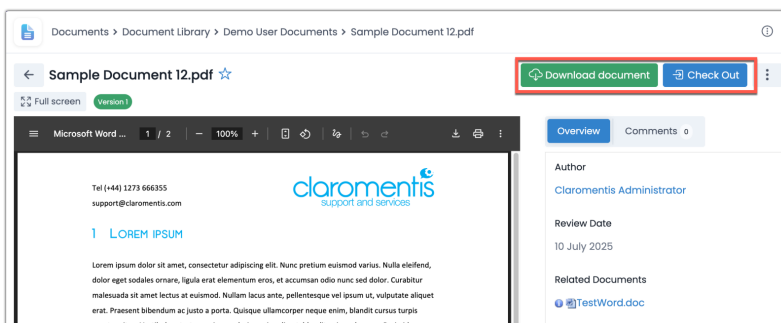
A preview can only be generated for file types that are supported; check what these are [here](#).

If your file type is supported by the preview not being generated or is showing an error, please let us know in a [support ticket](#) so we can assist you.

Preview page

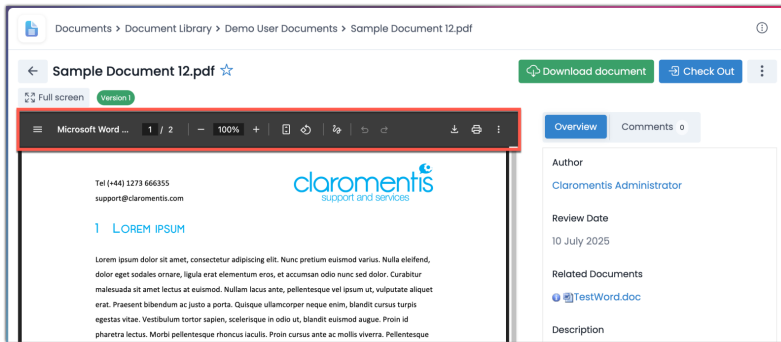
The main event on the preview page is the ability to [download the document](#) (using the green button)

The second most important is the [check out button](#), which allows the user to upload a new version of the document (if they have all [permissions](#) required to perform this action - 'View', 'Edit & approve' and 'Edit metadata')



The document preview itself is generated by the browser being used, so there are slight display and option differences between them (e.g. Chrome vs Edge vs Firefox), but the core functionality is the same.

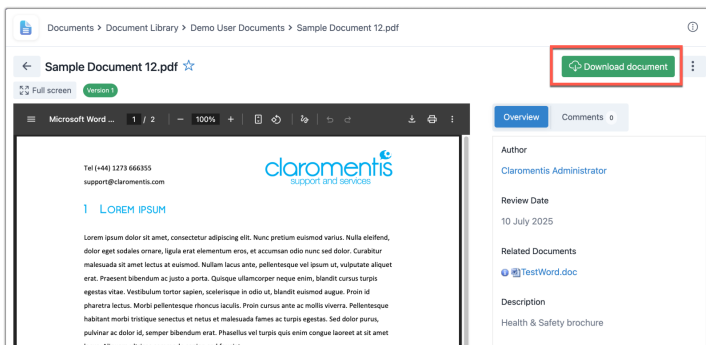
Users can see the document as it is and scroll through this if there are multiple pages, as well as zoom in and out or download the file using the controls given:



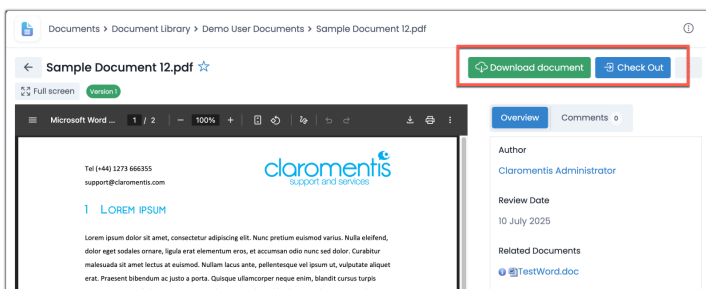
- Download and Check out buttons

A user with only the [permission](#) to 'view' a document will always see the [option to download it](#).

However, they will not see the check out/in button as they have no permission to upload a new version.



A user with 'view' and 'edit & approve' [permissions](#) to the file will see both the download and [check-out/in buttons](#), as they have been allowed to upload a new version.



Read more about the download and check-in/out functions in their respective guides linked above.

- Overview Tab

The [metadata](#) that appears alongside the preview in the 'Overview' tab is custom-configured.

Your administrators can set up fields most relevant to your needs to ensure they appear next to the preview to provide more information about your files:

Admin > Metadata > Edit metadata set

Metadata for: Documents

Metadata set name: Docs

Save

Export

| Key / Order # | Title | Type | Default value | Editable | Repeatable | |
|-------------------|-------------------|-----------------------|---------------|-------------|-------------|-------------|
| author | Author | User select | | <div></div> | | <div></div> |
| review_date | Review Date | Date | | <div></div> | | <div></div> |
| related_documents | Related Documents | Reference to document | | <div></div> | <div></div> | <div></div> |

Use drag-and-drop on first column to change order of fields

Create new field

Attach existing field

Documents > Document Library > Demo User Documents > Sample Document 12.pdf

Sample Document 12.pdf

Download document

Check Out

Full screen

Version 1

Microsoft Word ... 1 / 2 100% +

Overview

Comments 0

Author

Claramentis Administrator

Review Date

10 July 2025

Related Documents

TestWord.doc

Description

Health & Safety brochure

Version comment

Updated section 'Hard hats' 2025

Last modified

The other fields that appear in the 'Overview' tab are hardcoded to appear.

'Description' and 'Version comment' can be filled out by the creator at upload or after upload by any user with 'edit metadata' permissions via the 'edit properties' tab.

Documents > Document Library > Demo User Documents > Sample Document 12.pdf

Sample Document 12.pdf

Download document

Check Out

Full screen

Version 1

Microsoft Word ... 1 / 2 100% +

Overview

Comments 0

Author

Claramentis Administrator

Review Date

10 July 2025

Related Documents

TestWord.doc

Description

Health & Safety brochure

Version comment

Updated section 'Hard hats' 2025

Last modified

Claramentis Administrator on 04-06-2025 15:37

Owner

Claramentis Administrator Created on 13-01-2015 09:25

Filesize: 91167 (89.03 Kb)

Verify this document

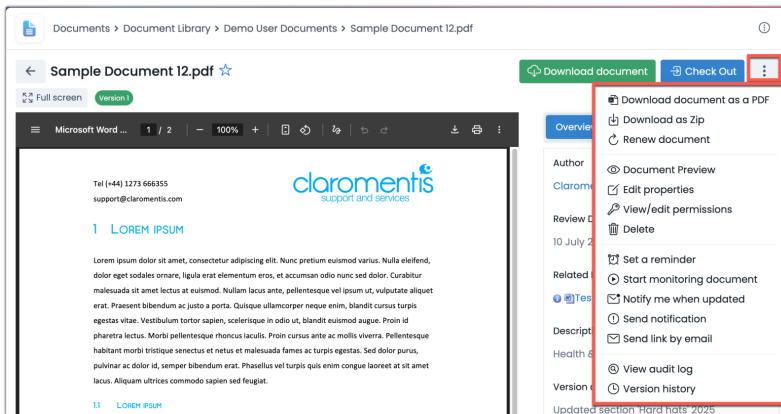
'Last modified' will update when changes are made to the file, and 'Creator' cannot be edited; this will display the user who uploaded the file.

Only if a user profile is [deleted](#) and their document ownership is reassigned to another profile will 'Owner' update to a different person.

- Options menu

Clicking the three dots will reveal all the actions a user can perform for the document that has its preview open.

The user will only see options here that they have permission to perform e.g. if a user does not have 'edit metadata' [permission](#) to a file, they will not see the 'edit properties' option listed.



- **Download the document as a PDF:** Download the document as a PDF (even if this is not its original file type)
- **Download as a ZIP:** Download the file in a ZIP
- **Renew document:** Upload a new version of the file (without checking it out)
- **Document Preview:** Opens the document preview page
- **Edit properties:** View and edit the properties and metadata associated with the file e.g. title, description
- **View/edit permissions:** Assign access rights for the file to users/roles/groups. Option to inherit the rights from the parent folder (to save having to input this for each new document in the folder). **Please note:** The permission to edit permissions can only be given by administrators from the [admin side of Documents](#).
- **Delete:** Send the file to the trash. The document will be held in the trash for 30 days. It can be restored in this time frame, but will be automatically deleted when 30 days have elapsed.
- **Set reminder:** Input a date that a notification reminder will be sent to you in the in system messenger.
- **Start monitoring document:** Ensure you are notified of any changes to the document, including if it has been checked out or a new version is uploaded. Notifications will continue until monitoring is turned off.
- **Notify me when updated:** Receive a notification when the next change is made to the document.
- **Send notification:** Send a notification in that instance to users on the intranet with an instruction/note.
- **Send link by email:** This will open up the email on your computer with a link to the document ready to send.
- **View audit log:** A history of any changes that have occurred with the document.
- **View version history:** If there have been multiple versions uploaded, a list will appear here with the date and time each version was uploaded.