Link to article: https://discover.claromentis.com/knowledgebase/articles/893/documents-bulk-export



## Documents: Bulk Export

Follow this guide if you wish to bulk export documents and folders en masse from the Intranet, and your site is self-hosted.

Self-hosted sites can run large exports as well as smaller ZIP downloads in the system; however, sites hosted by us (SaaS) can only use the ZIP function.

If you're SaaS and require a large export of documents from your site, please submit achange request ticket so we can assist you with this.

## Large export or export of multiple folders at once - On-Premise only (Self-hosted system)

## Head to Admin > Documents > Documents export:

| Admin  | Admin > Documents |  |    |
|--|-------------------|--|----|
| DOCUMENTS<br>Concentents insport<br>Documents import<br>Documents export<br>Trash can<br>Documents perforts<br>Documents perforts<br>Documen | ERMS features     | Ori Use ERMS records (ERMS_CONFIG_RECORD) Ori Use ERMS markers (ERMS_CONFIG_RECORD, TYPES) Ori Use molif-component documents (ERMS_CONFIG_MECORFIG_TYPES) Ori Use molif-component documents (ERMS_CONFIG_SECURITY_LEVEL) Ori Use Signature for documents (ERMS_CONFIG_SECURITY_LEVEL) Ori Use ERMS schedules (ERMS_CONFIG_SCHEDULE) Ori Use ERMS schedules (ERMS_CONFIG_SCHEDULE) Ori Use Coogle drive links (ERMS_CONFIG_DOCULARKS) Ori Use Microsoft OneDrive links (ERMS_CONFIG_ONDERVE_LINKS) Ori Use Microsoft OneDrive links (ERMS_CONFIG_ONDERVE_LINKS) |    |
| & General<br>configuration   | Statistics        | Number of Documents  | 54 |
| EE Metadata  |                   | Number of all versions of documents  | 66 |
| Record types   |                   | Number of checked out documents  | 0  |

Select the folder you wish to export from the picker (subfolders will be exported if they exist inside the folder chosen)

Specify the server pathway to which the export will be saved.

| Admin                           | Admin > Documents > Import exported       |  |                    |  |
|---------------------------------|---|--|--------------------|--|
|                                 | Select folder to export                   |  | Change             |  |
| documents list                  | Full server path to save exported<br>data |  | Check availability |  |
| Documents import                | Documents versions to export              | <ul> <li>all versions</li> <li>only latest versions</li> </ul> |                    |  |
| Documents export                | Export metadata as                        | XML     CSV  |                    |  |
| 🛱 Trash can                     |   |  |                    |  |
| Documents reports               |   | Start export   |                    |  |
| Documents<br>permissions report |   |  |                    |  |
| CONFIGURATION                   |   |  |                    |  |

Decide to export all versions of every document that is included or only the latest versions.

Choose to export this as an XML file or a CSV file.

Click 'sStart export' to begin, and once this is complete, the files should be available at your chosen server location.

## In system ZIP download - Any site

This is the export of a single folder's worth of content; it can be repeated to download multiple folders over time.

Please note: Only files can be selected; if a subfolder is included, the ZIP option will not be evident.

Navigate into the folder you wish to retrieve all the documents for and select all of its contents (or only those you wish to export) using the checkboxes, and the 'download as ZIP' option should appear:

| Filter the current folder    | × | ● Document ● Folder ♀ 键 ☆ 홈 |  |
|------------------------------|---|-----------------------------|--|
|                              |   | 12 mems selected            |  |
|                              |   | ∷ ≡ 88                      |  |
|                              |   |                             |  |
| Parent folder                |   |                             |  |
| 🛛 🏠 🖻 Sample Document 12.pdf |   |                             |  |
| 🛛 🏠 🖻 Sample Document 2.pdf  |   |                             |  |
| 🛛 👆 🔁 Sample Document 3.pdf  |   |                             |  |
| 🛛 🏠 🐑 Sample Document 4.pdf  | * |                             |  |
| 🛛 🏠 🐑 Sample Document 5.pdf  |   |                             |  |

Following this, the download of the selected files should take place on your local machine.

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