Link to article: https://discover.claromentis.com/knowledgebase/articles/907/documents-configuration-panel

Documents Configuration Panel

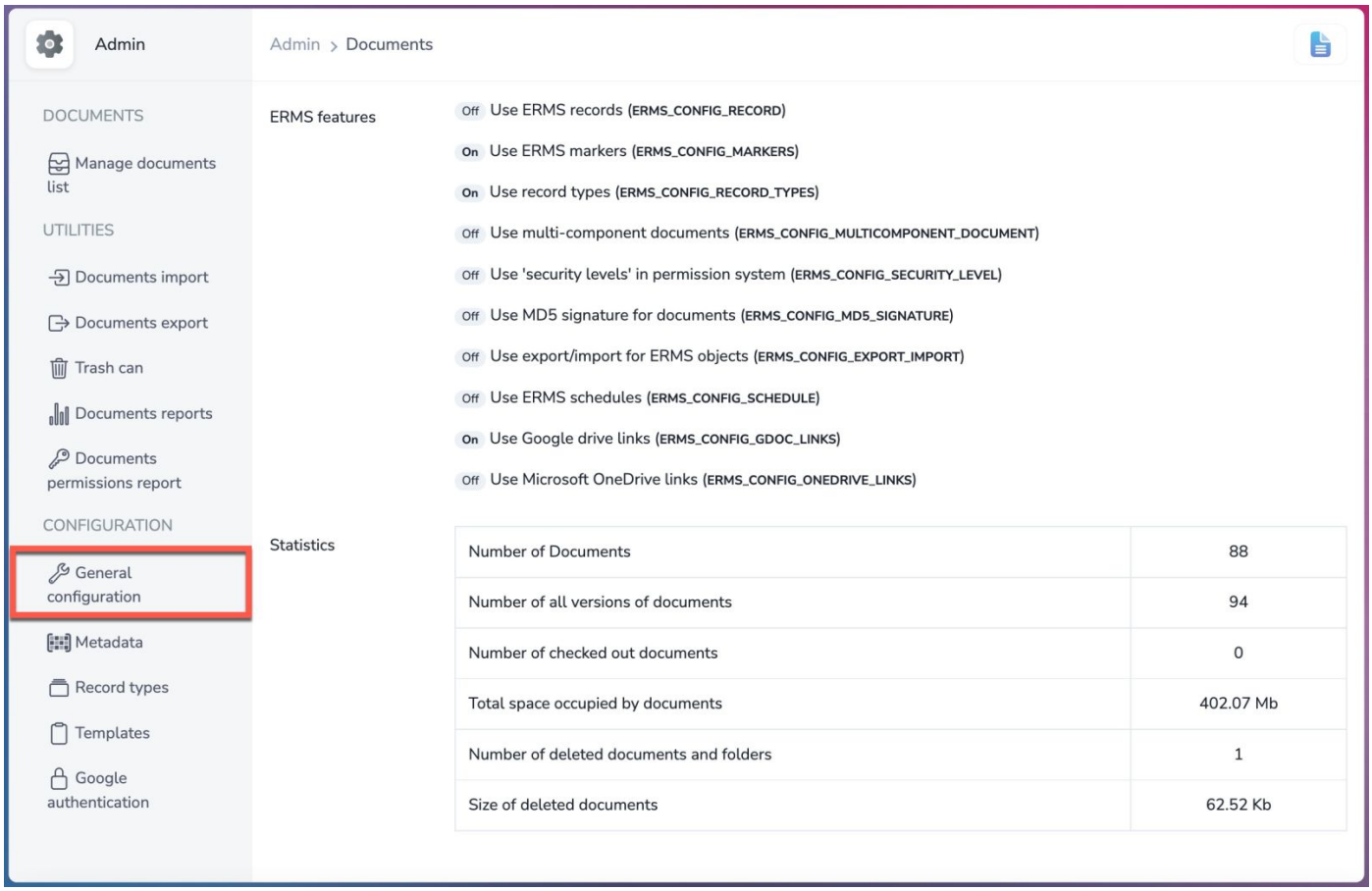
There are various confiugration options available in the Documents application. The configuration options will reflect what can be viewed & edited from the front-end of the Document application.

This guide will oultine how to set each configuration option and what it will look like from the front-end of the application.

Please be extremely careful changing these configuration options. They potentially can make the system unusable. Some options become active only after logging out and logging in again.

The admin panel & documents permissions

As a Document application admin, the configuration panel can be accessed via **Admin > Documents > General Configuration**.

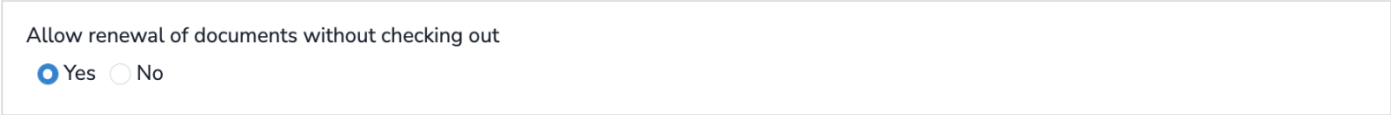


For more information, check out our guide on assigning Application Administrators.

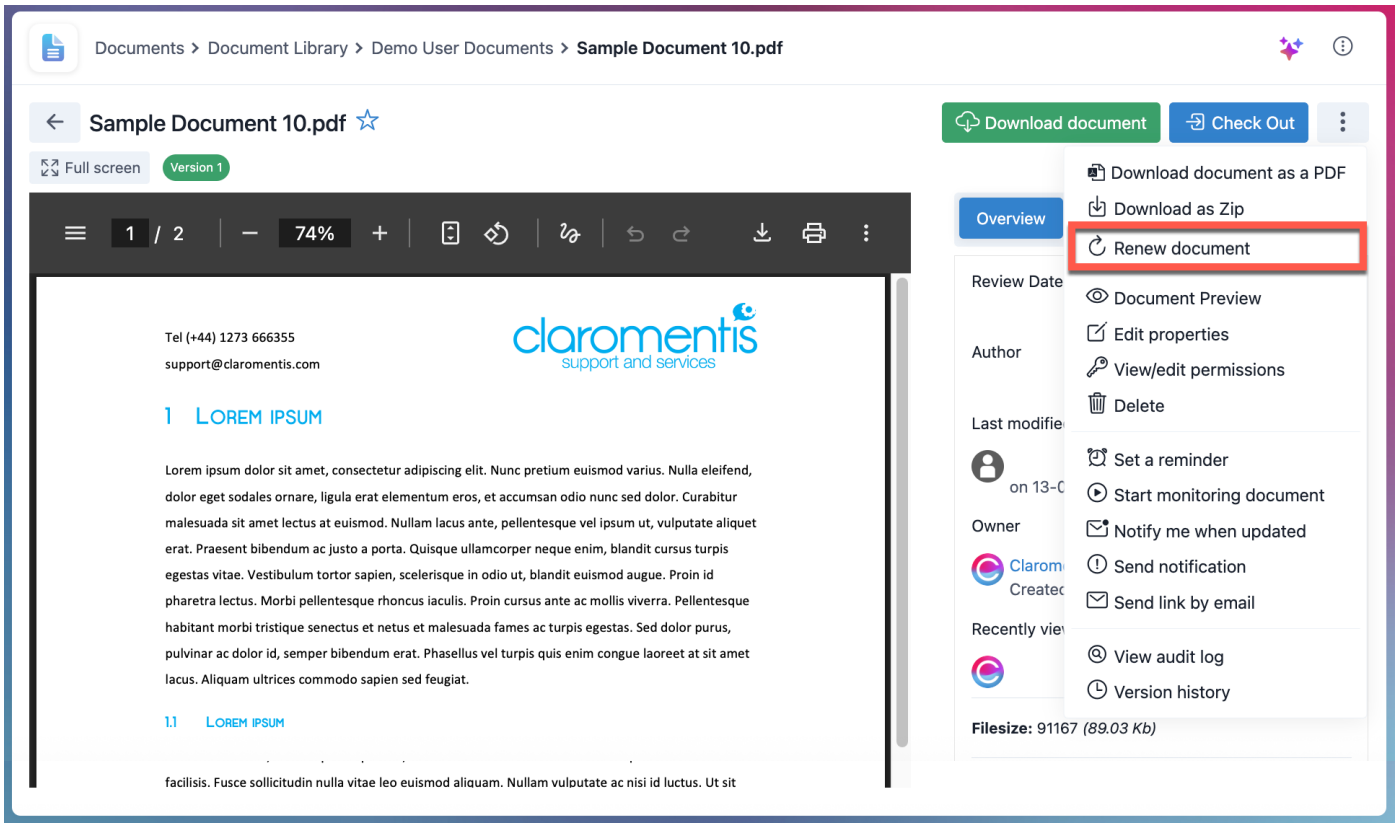
General configuration

Allow renewal of documents without checking out

If enabled, users can renew a document version without going through the check-out process.



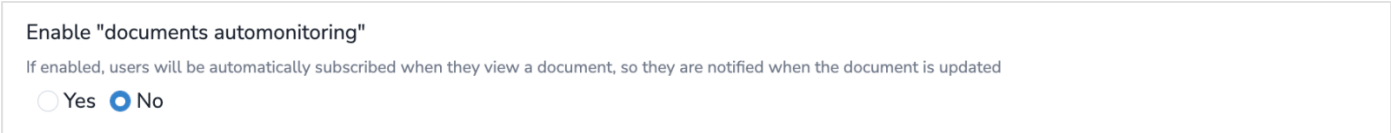
The **Renew** button will be available, and the document can be directly uploaded & renewed.



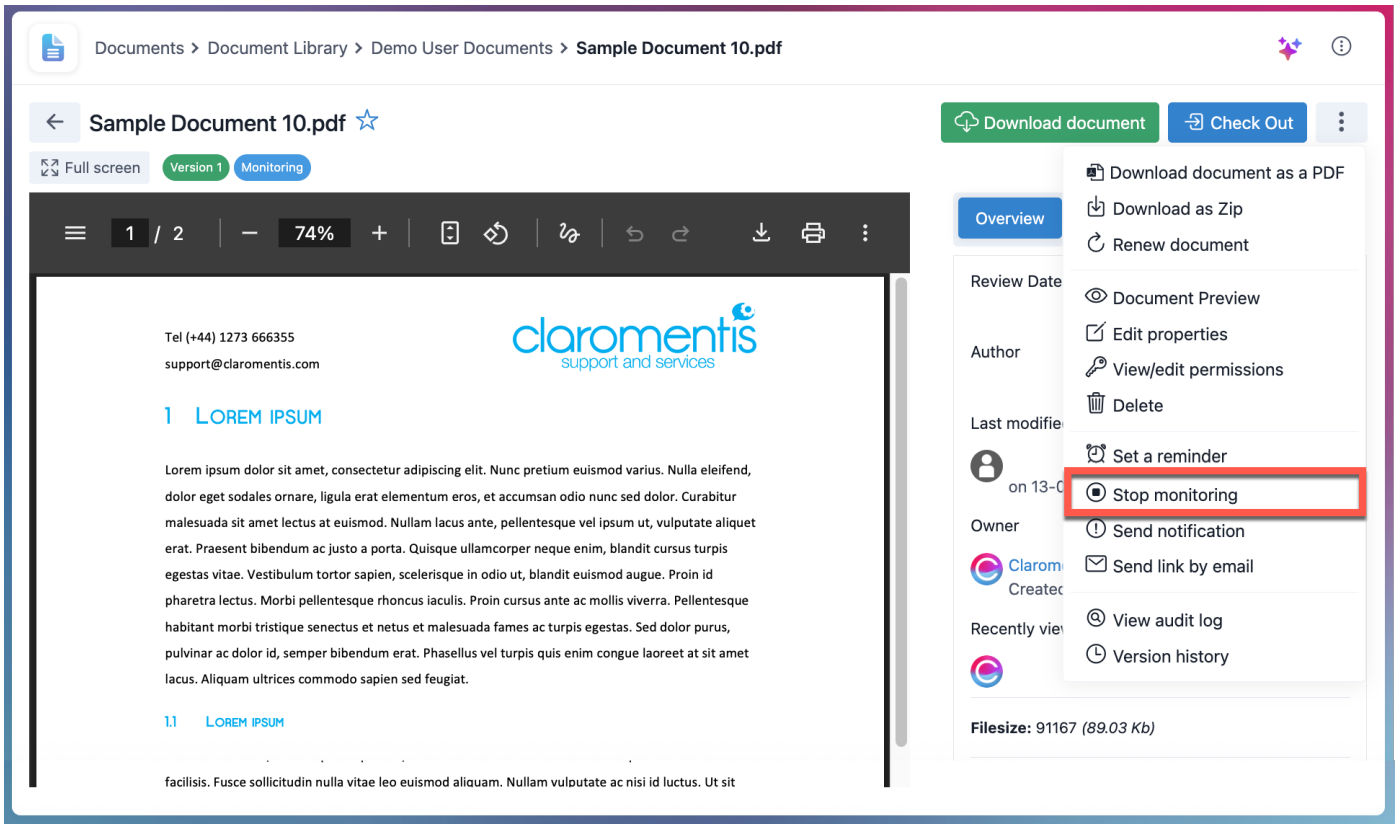
For more information, check out our guide on Editing a Document & Version Control.

Enable "documents auto-monitoring"

If enabled, users will be automatically subscribed when the document is viewed. Notifications will be sent out any time the document is renewed, updated, or deleted.



Users can opt out of the monitoring feature by selecting the **Stop Monitoring** option for each document.

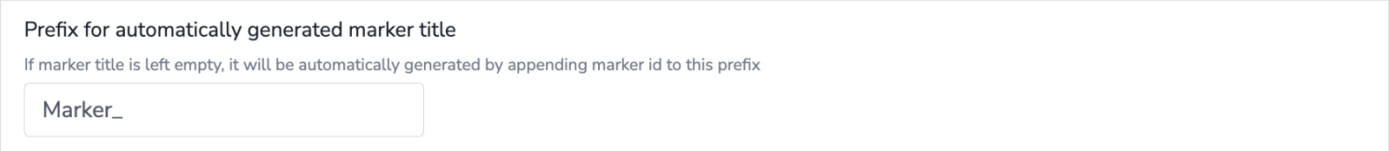


Please note: Notification will be sent according to the individual user's notification preference. Check out our guide on Notification Preferences.

For more information, check out our guide on the Document Monitoring feature.

Prefix for automatically generated marker title

Document markers can be added for files or physical files outside Claromentis. The value entered will automatically become the prefix for document marker titles.

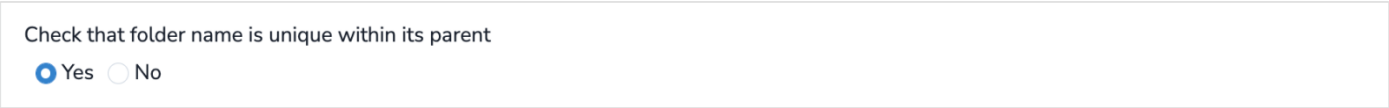


Please note: If the marker title is left empty, it will be automatically generated by appending marker ID to this prefix

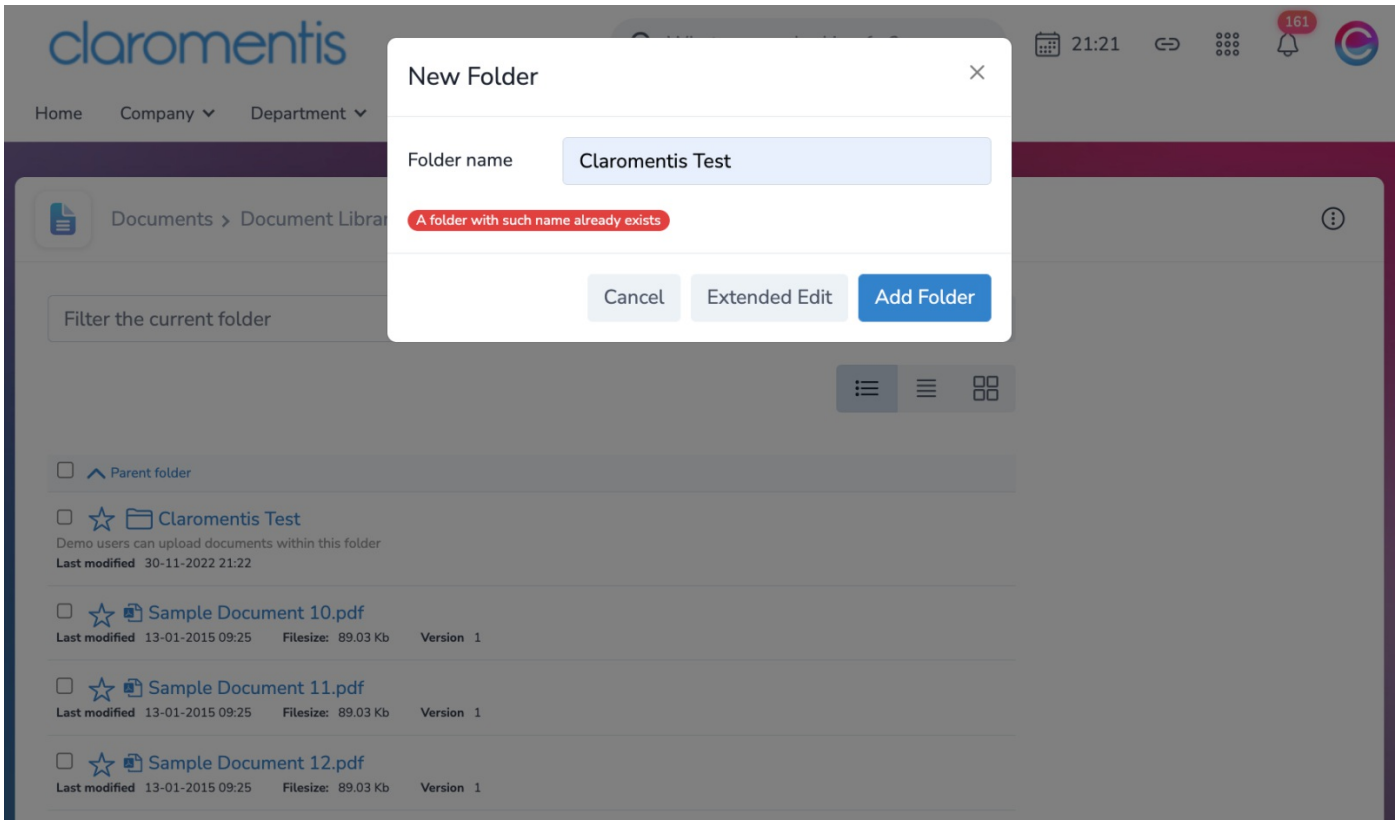
For more information, check out our guide on Digitial Markers.

Check that folder name is unique within its parent

If enabled, folder title(s) will be unique and cannot be identical with another folder name within its parent/nested folder.



If a duplicate-titled folder is uploaded, the following error will appear. The folder name must be updated to a unique title before folder upload is attempted again.



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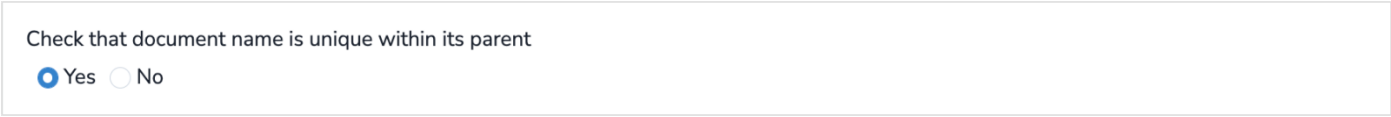
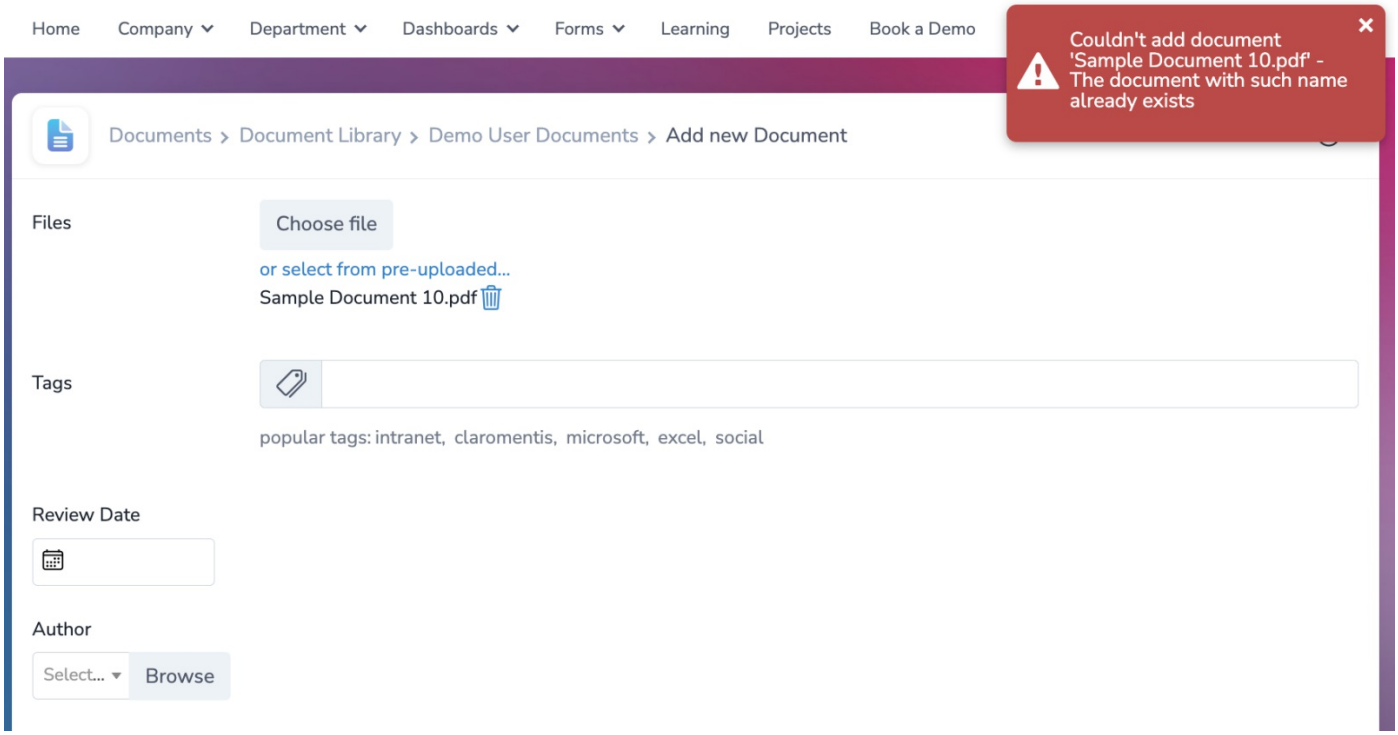
If enabled, document title(s) will be unique and cannot be identical with another document name within it's parent/nested folder.

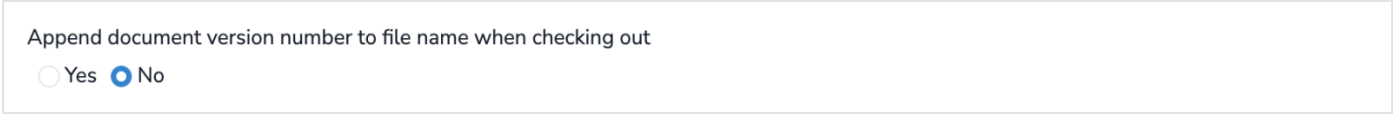


If a duplicate-titled document is uploaded, the following error will appear. The document name must be updated to a unique title before the document upload is attempted again.



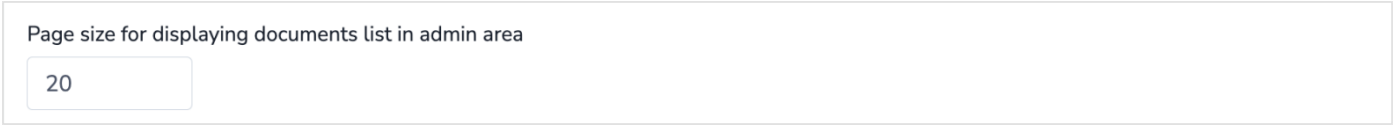
Append document version number to file name when checking out

If enabled, the document version number will be included in the file name when it is checked-out.



Page size for displaying documents list in admin area

The value entered determines the page size for the document list only in the Admin section of Documents.



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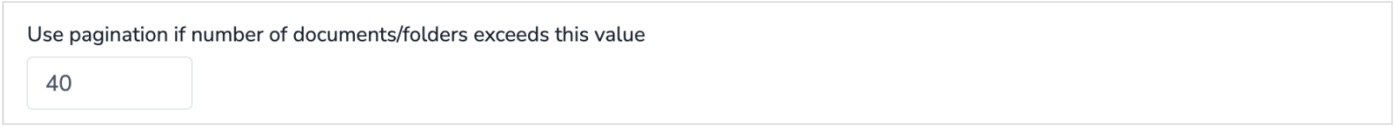
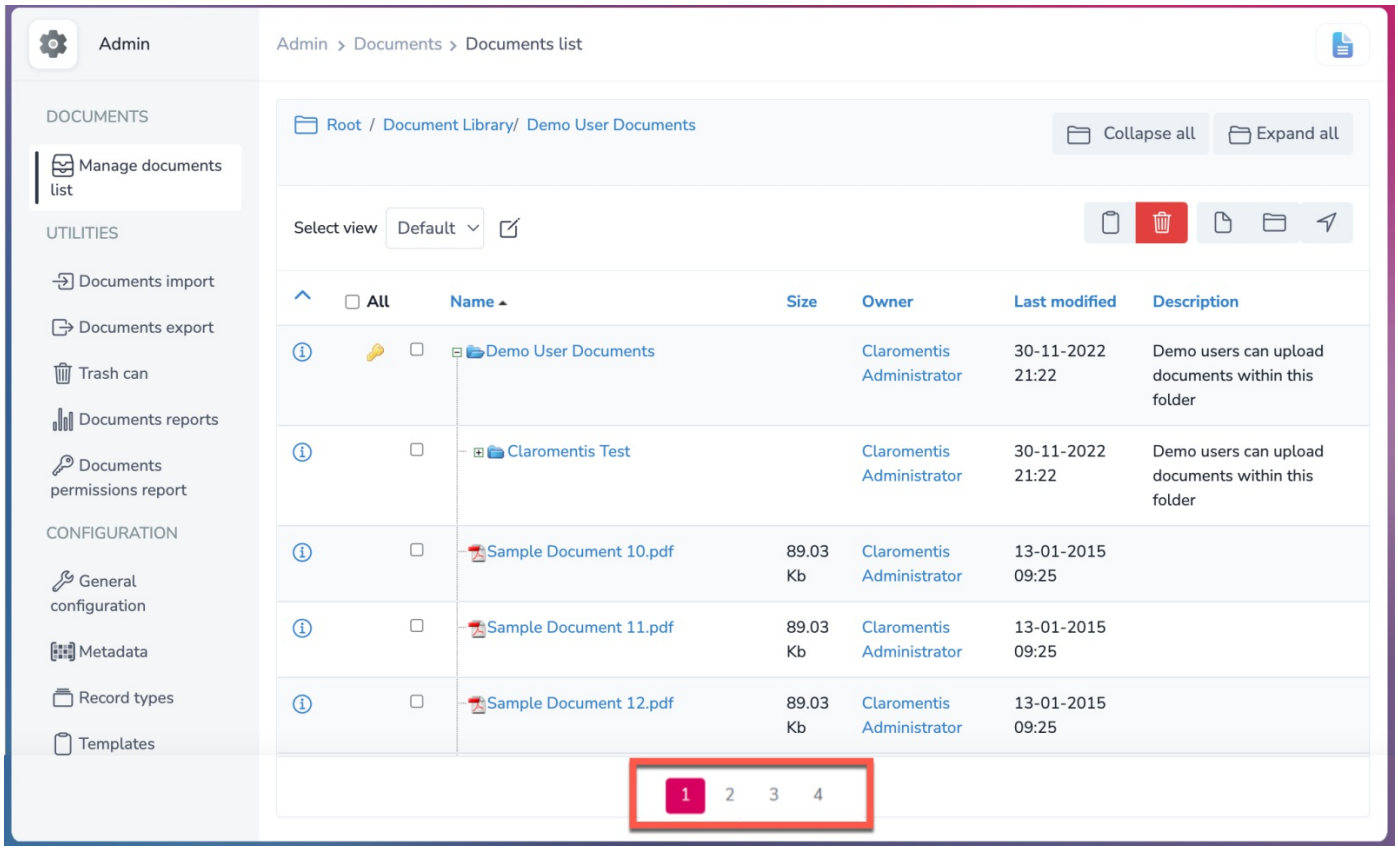
Use pagination if number of documents/folders exceeds this value

The value entered determines the maximum number of documents & folders before pagination is used in the Admin section of Documents.

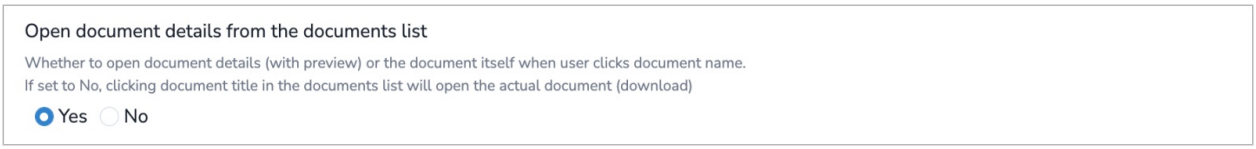


Documents & folders that exceed the set number will display page numbers.

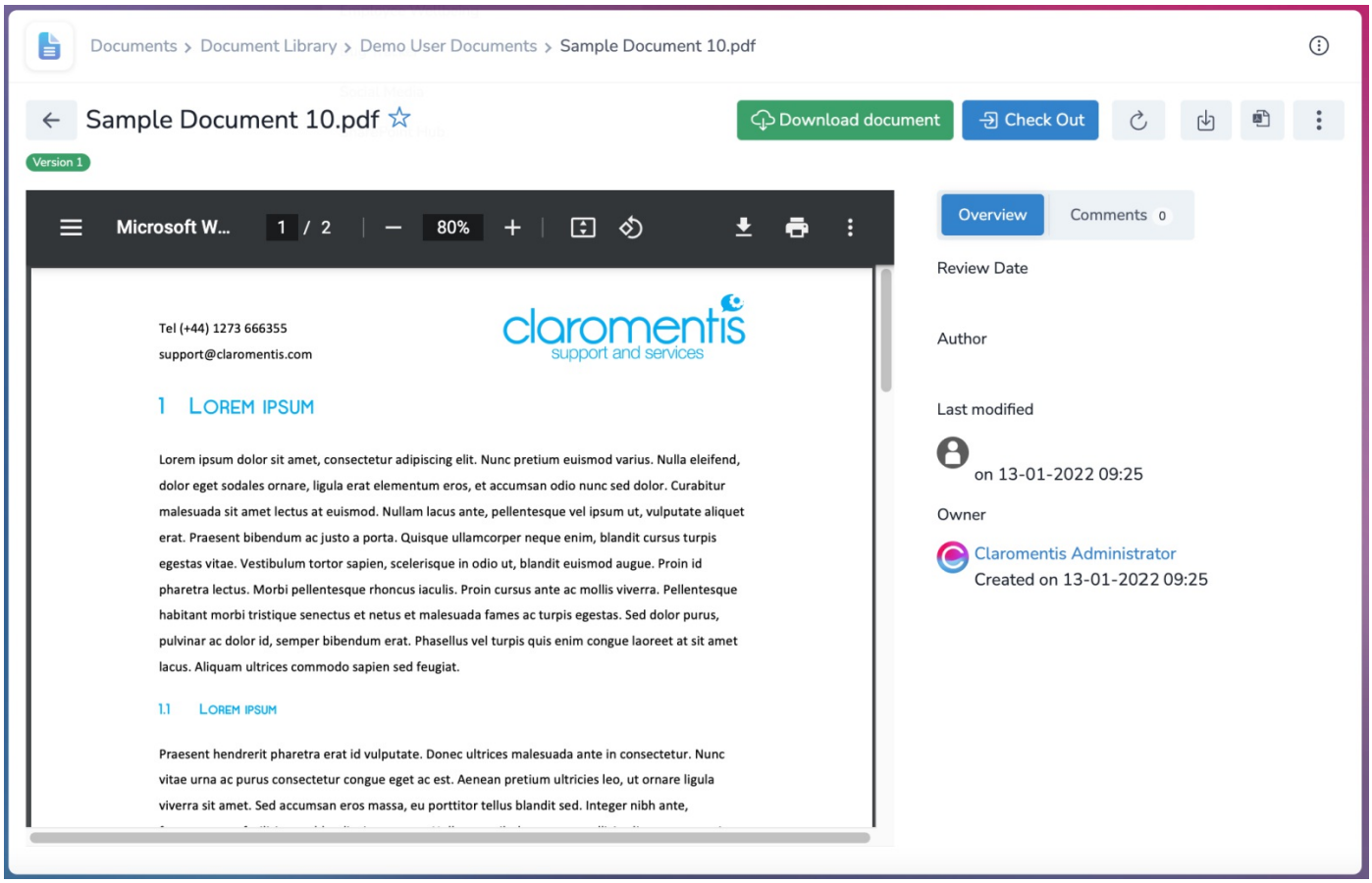


Open document details from the documents list

If enabled, the **Document Preview** will open. If disabled, the document will be downloaded without the user being navigated to the preview.



The document preview will be generated by the browser, and the document can be viewed without being downloaded.

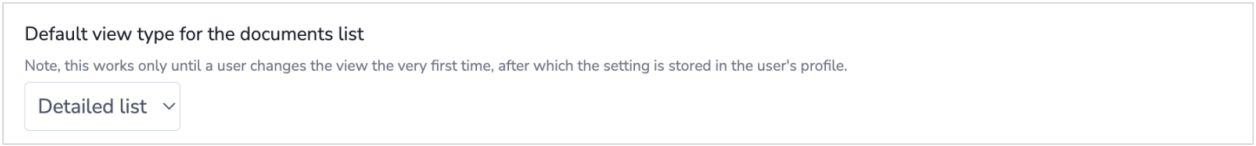


Only supported file types will be generated by the preview. For more information on supported file types, check out our guide here.

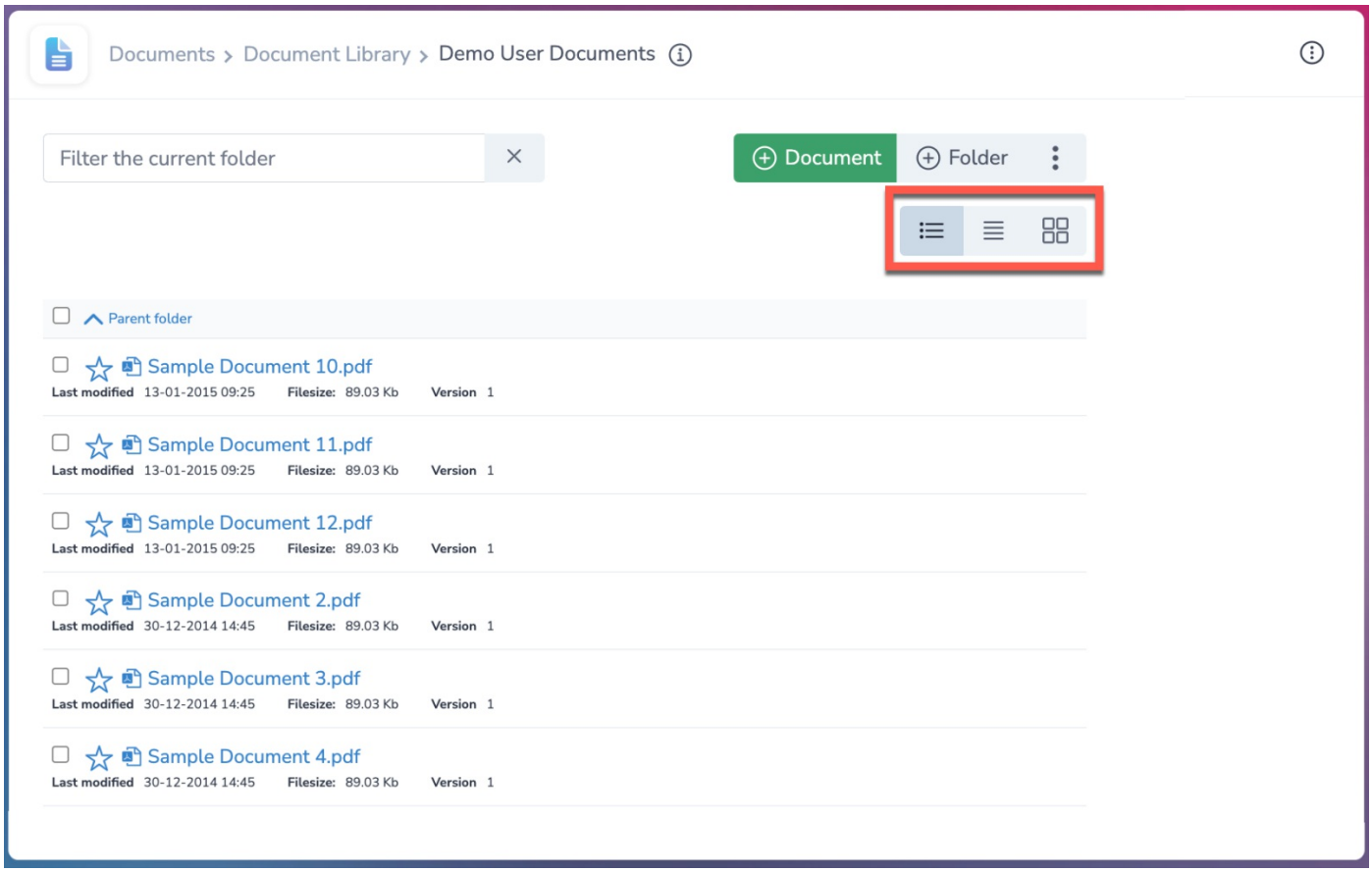
For more information on the Document preview, check out our guide here.

Default view type for the documents list

There are 3 different view options for folders & documents from the front-end: **Detailed List**, **Compact List**, **Thumbnail view**. The selected option will display as standard when a user first navigates to the Documents application.



Users can choose a different view type if they wish from the front-end of the application.

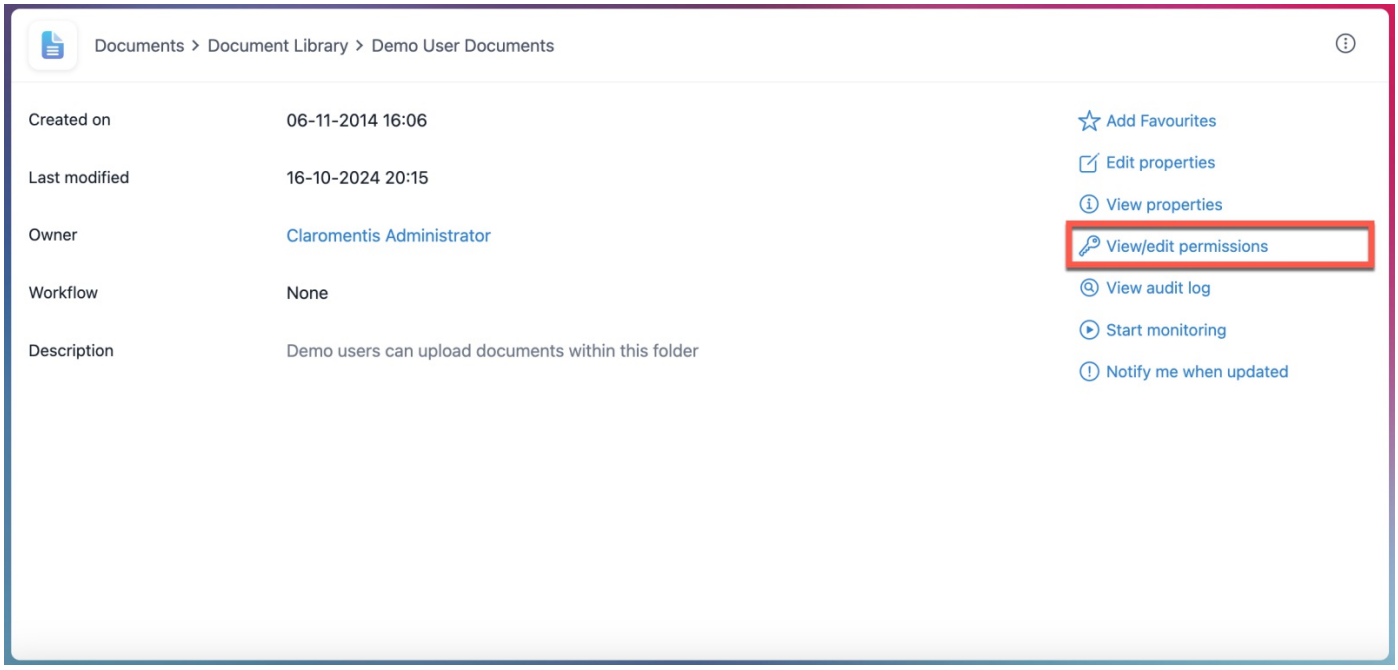


Please note: The default view can be changed by the user at any time, after which the setting is stored in the user's profile.

People with only view rights can see permissions

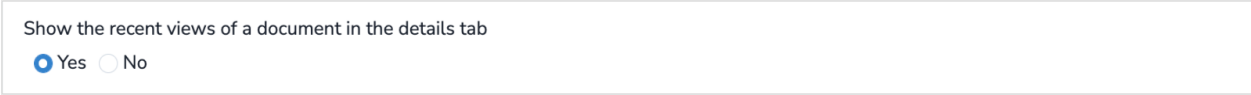
If enabled, only users with 'View' rights can see the **View/edit permission** option.

Users can view the permissions in the folder details or when previewing the document details.

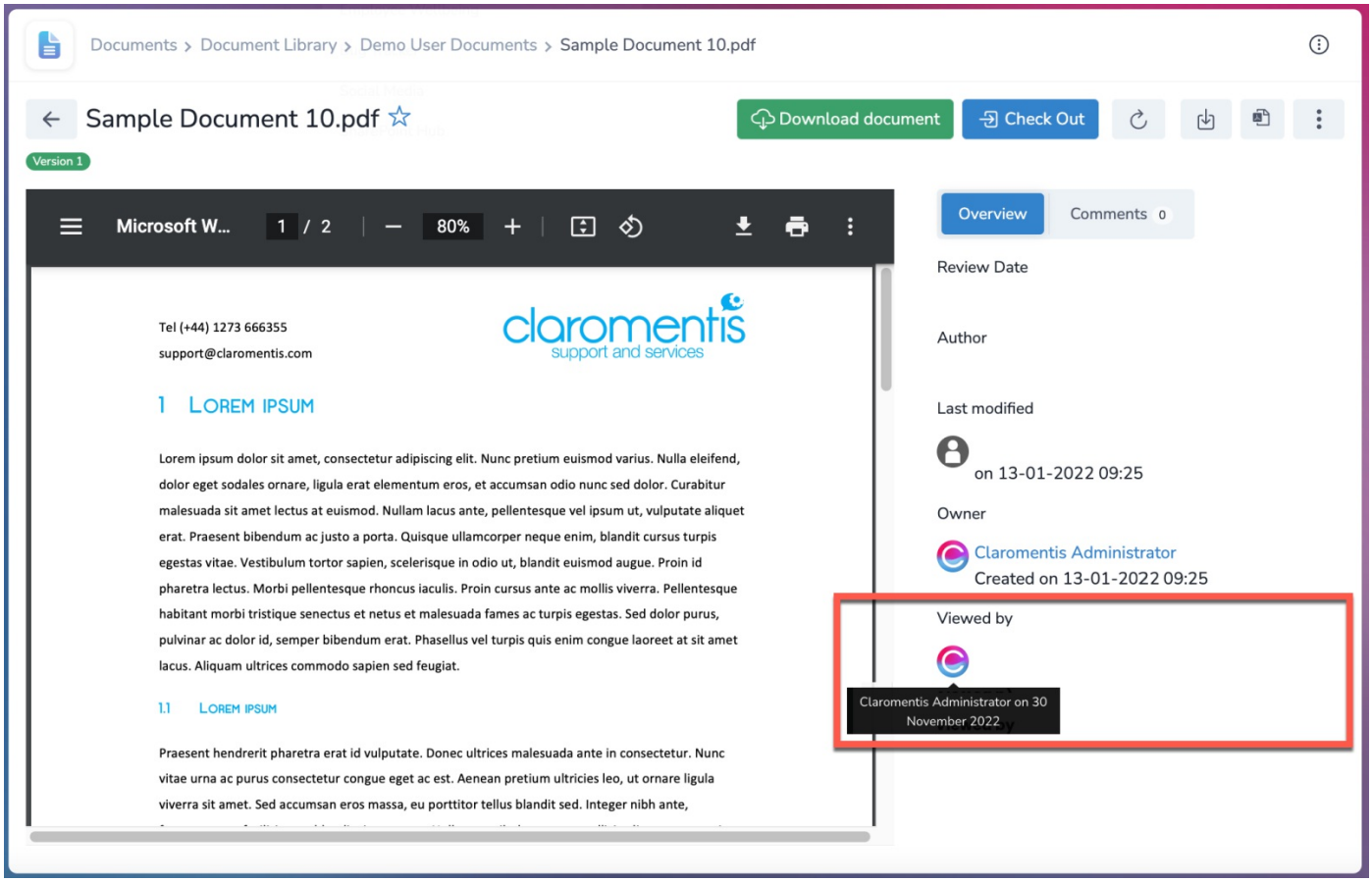


Show the recent views of a document in the details tab

If enabled, the document overview will display users who have recently viewed the document.

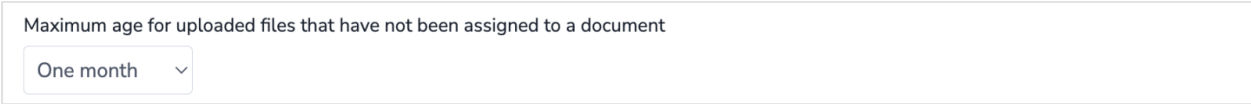


The **Viewed By** field will be available, and users can see recent viewers and the date the document was viewed.

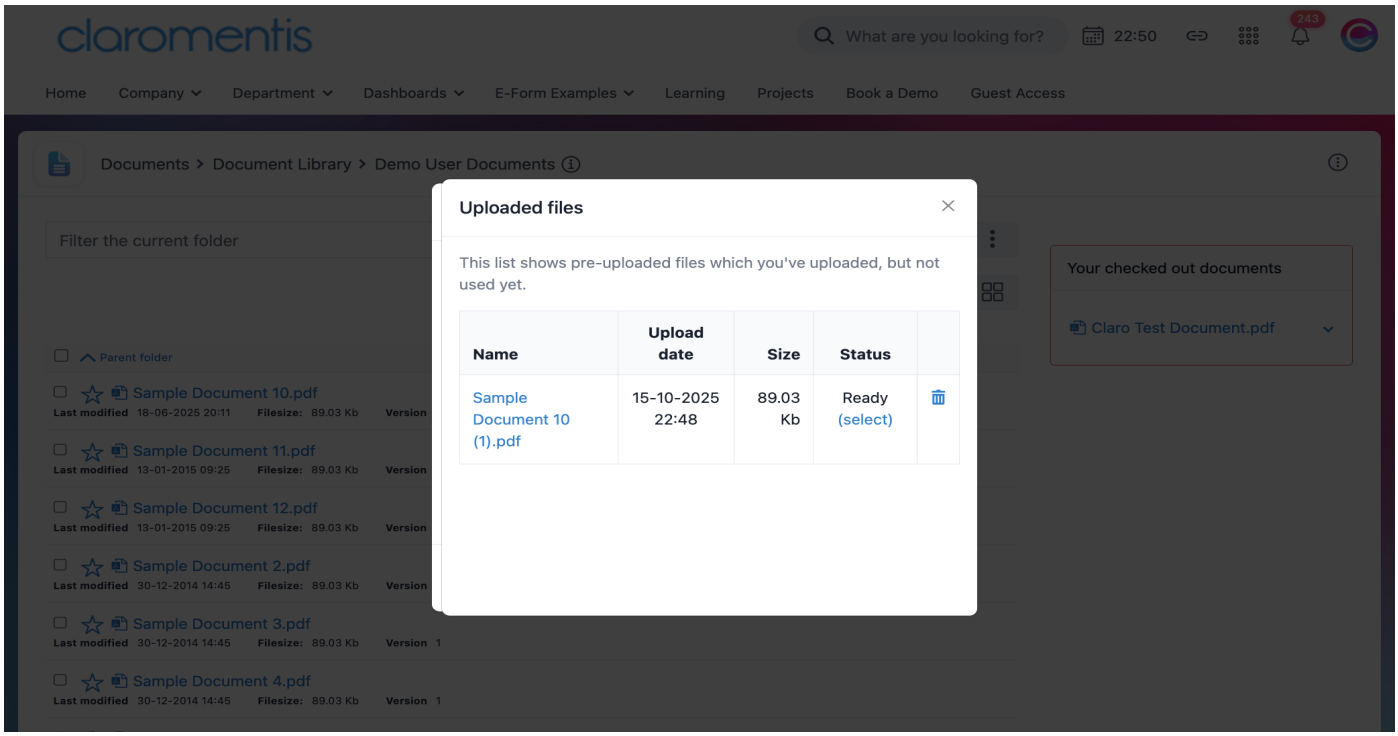


Maximum age for uploaded files that have not been assigned to a document

The value entered determines the maximum age allowed for uploaded files that have not been assigned to a document.



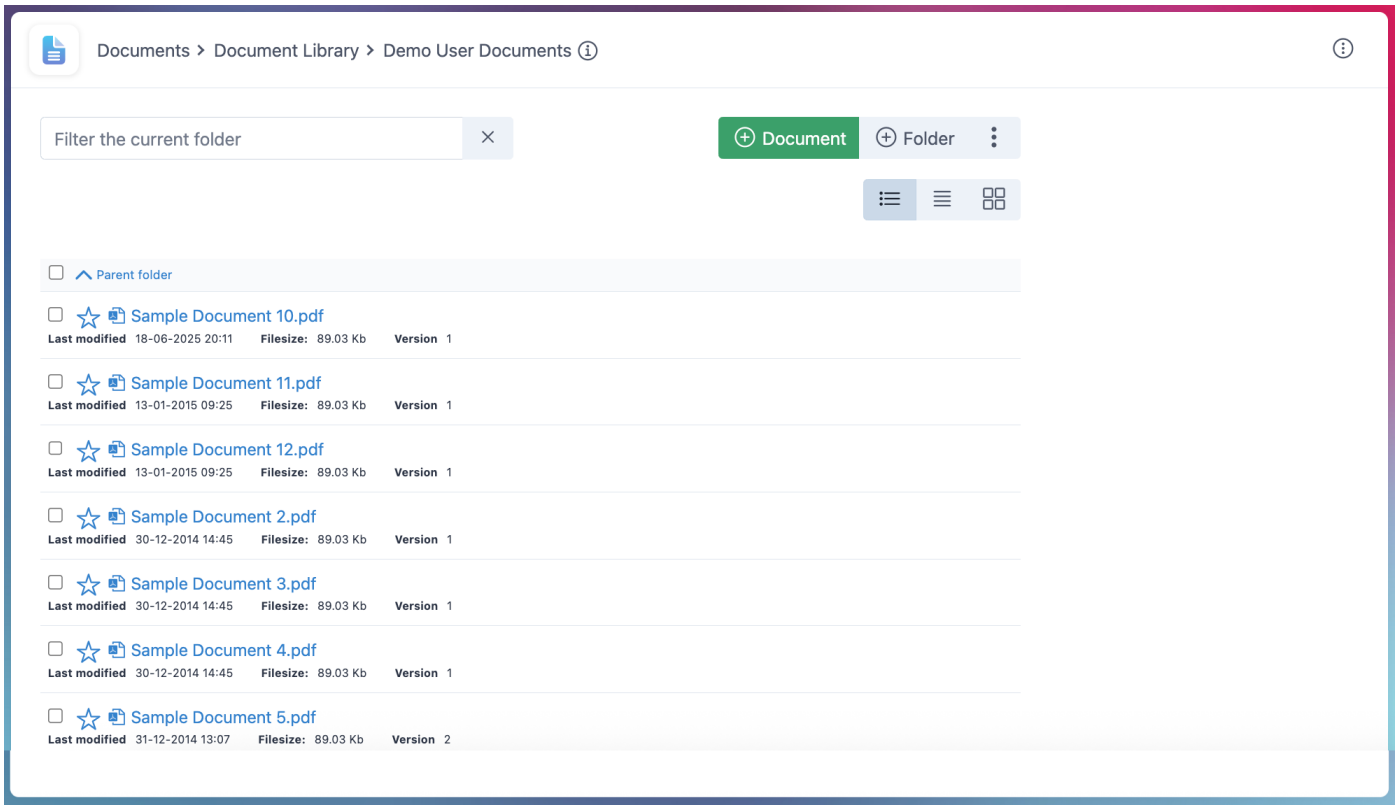
These files will be available for selection in the **Pre-Uploaded Files** section when you upload a document.



Select metadata to display on the list view

The default metadata set for Documents will display when viewing documents in List view.

Users can view the document details, including Date Modified, Filesize, and Document Version.



Created on 20 October 2025 by Veronica Kim
Tags: documents, files, folder, user guide