



## Documents Configuration Panel

There are various configuration 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 outline 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**.

The screenshot shows the Admin interface for the Documents application. The left sidebar contains a navigation menu with the following items: Admin, 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). The 'General configuration' item is highlighted with a red box. The main content area shows the 'Admin > Documents' configuration panel. It is divided into two sections: 'ERMS features' and 'Statistics'. The 'ERMS features' section contains a list of configuration options with toggle switches: 'Use ERMS records (ERMS\_CONFIG\_RECORD)' (Off), 'Use ERMS markers (ERMS\_CONFIG\_MARKERS)' (On), 'Use record types (ERMS\_CONFIG\_RECORD\_TYPES)' (On), 'Use multi-component documents (ERMS\_CONFIG\_MULTICOMPONENT\_DOCUMENT)' (Off), 'Use 'security levels' in permission system (ERMS\_CONFIG\_SECURITY\_LEVEL)' (Off), 'Use MD5 signature for documents (ERMS\_CONFIG\_MD5\_SIGNATURE)' (Off), 'Use export/import for ERMS objects (ERMS\_CONFIG\_EXPORT\_IMPORT)' (Off), 'Use ERMS schedules (ERMS\_CONFIG\_SCHEDULE)' (Off), 'Use Google drive links (ERMS\_CONFIG\_GDOC\_LINKS)' (On), and 'Use Microsoft OneDrive links (ERMS\_CONFIG\_ONEDRIVE\_LINKS)' (Off). The 'Statistics' section contains a table with the following data:

Number of Documents	88
Number of all versions of documents	94
Number of checked out documents	0
Total space occupied by documents	402.07 Mb
Number of deleted documents and folders	1
Size of deleted documents	62.52 Kb

For more information, check out our guide on assigning [Application Administrators](#).

## General configuration

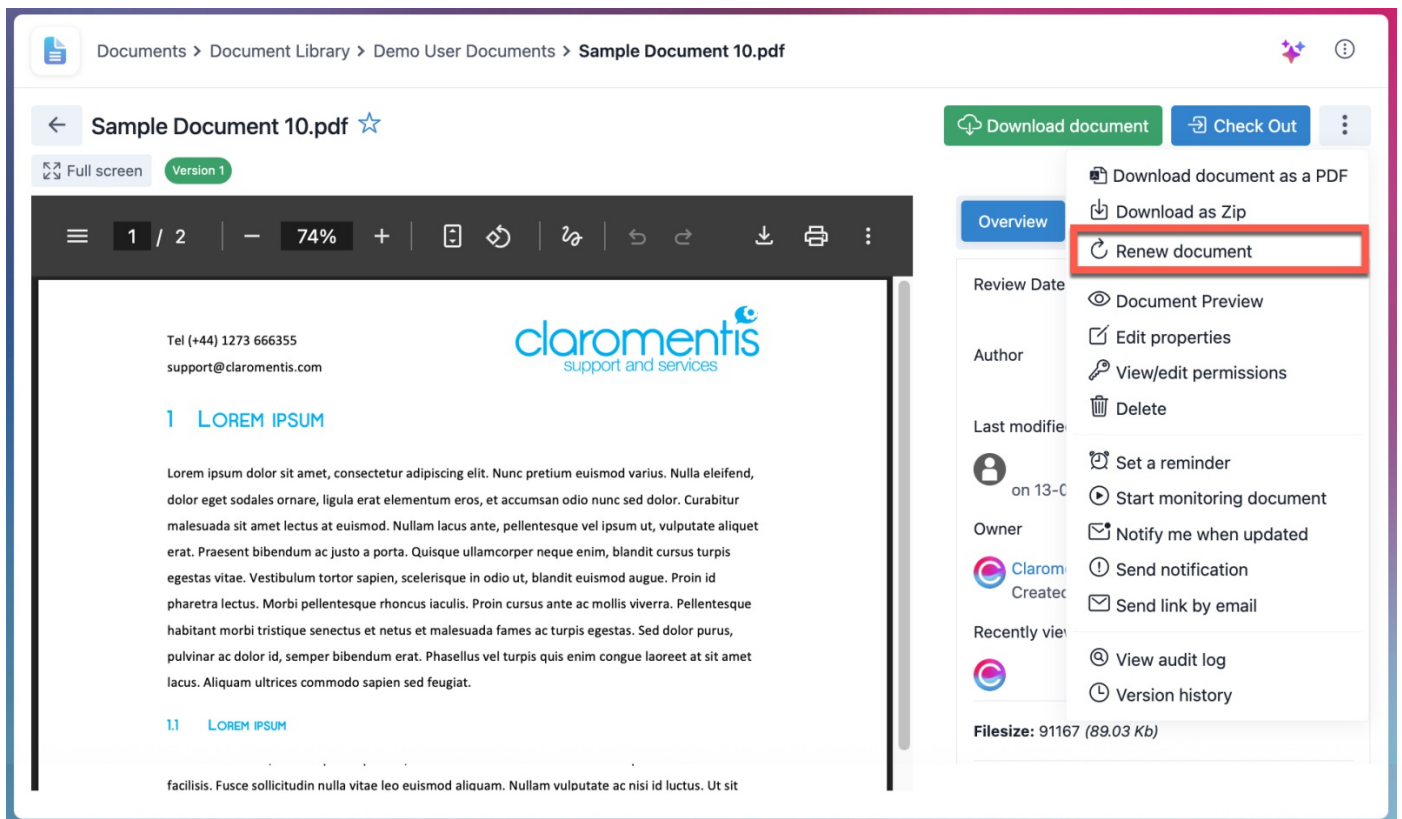
### Allow renewal of documents without checking out

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

Allow renewal of documents without checking out

Yes  No

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.

Enable "documents automonitoring"

If enabled, users will be automatically subscribed when they view a document, so they are notified when the document is updated

Yes  No

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 Claramentis. The value entered will automatically become the prefix for document marker titles.

Prefix for automatically generated marker title

If marker title is left empty, it will be automatically generated by appending marker id to this prefix

**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 [Digital Markers](#).

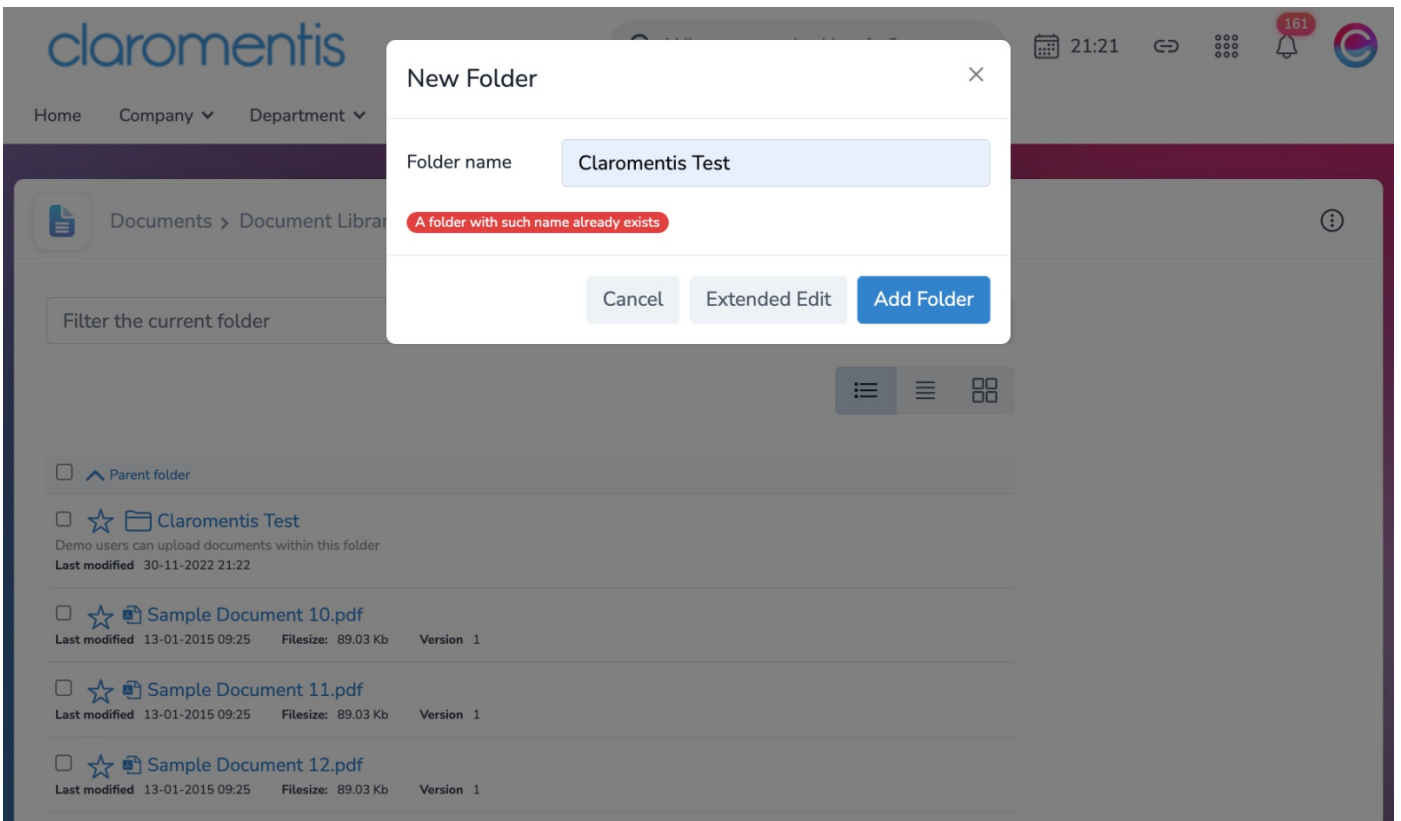
### Check that folder name is unique within its parent

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

Check that folder name is unique within its parent

Yes  No

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.



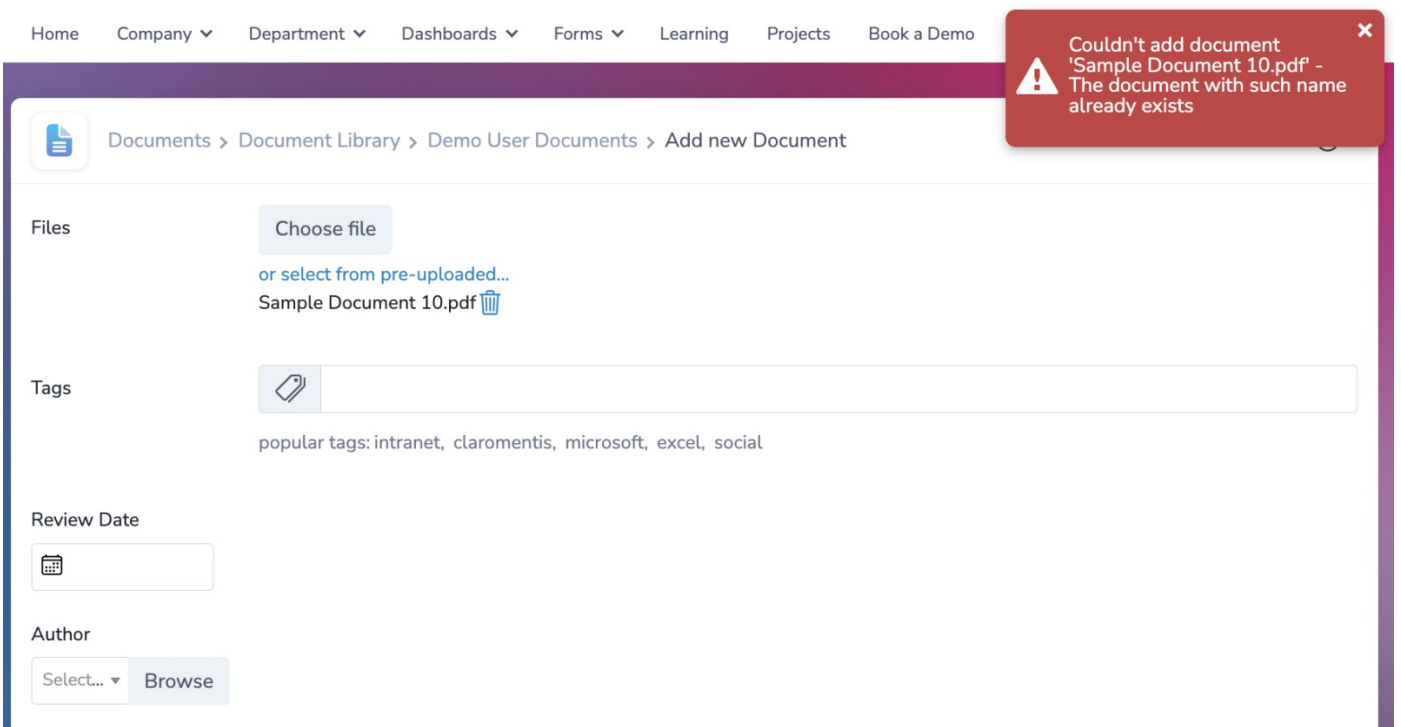
### Check that document name is unique within its parent

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

Check that document name is unique within its parent

Yes  No

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.

Append document version number to file name when checking out

Yes  No

### 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.

Page size for displaying documents list in admin area

### 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.

Use pagination if number of documents/folders exceeds this value

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

The screenshot shows the 'Admin > Documents > Documents list' interface. The left sidebar contains navigation options under 'DOCUMENTS' (Manage documents list) and 'UTILITIES' (Documents import, Documents export, Trash can, Documents reports, Documents permissions report). The main area displays a table of documents and folders. The table has columns for Name, Size, Owner, Last modified, and Description. The items listed are 'Demo User Documents', 'Claromentis Test', and three PDF files: 'Sample Document 10.pdf', 'Sample Document 11.pdf', and 'Sample Document 12.pdf'. At the bottom of the table, a pagination bar is visible, showing page numbers 1, 2, 3, and 4. The number '1' is highlighted in a red box.

	All	Name	Size	Owner	Last modified	Description
<input type="checkbox"/>	<input type="checkbox"/>	Demo User Documents		Claromentis Administrator	30-11-2022 21:22	Demo users can upload documents within this folder
<input type="checkbox"/>	<input type="checkbox"/>	Claromentis Test		Claromentis Administrator	30-11-2022 21:22	Demo users can upload documents within this folder
<input type="checkbox"/>	<input type="checkbox"/>	Sample Document 10.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
<input type="checkbox"/>	<input type="checkbox"/>	Sample Document 11.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
<input type="checkbox"/>	<input type="checkbox"/>	Sample Document 12.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	

1 2 3 4

## 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.

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

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

The screenshot shows a web interface for viewing a document. The breadcrumb path is 'Documents > Document Library > Demo User Documents > Sample Document 10.pdf'. The document title is 'Sample Document 10.pdf' with a star icon. Action buttons include 'Download document', 'Check Out', and a refresh icon. A 'Version 1' badge is present. The document is displayed in a Microsoft Word viewer at 80% zoom. The document content includes contact information for 'claromentis support and services', a 'LOREM IPSUM' section, and a sub-section '1.1 LOREM IPSUM'. On the right, a sidebar shows 'Overview' and 'Comments 0'. Metadata includes 'Review Date', 'Author', 'Last modified on 13-01-2022 09:25', and 'Owner: Claromentis Administrator Created on 13-01-2022 09:25'.

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

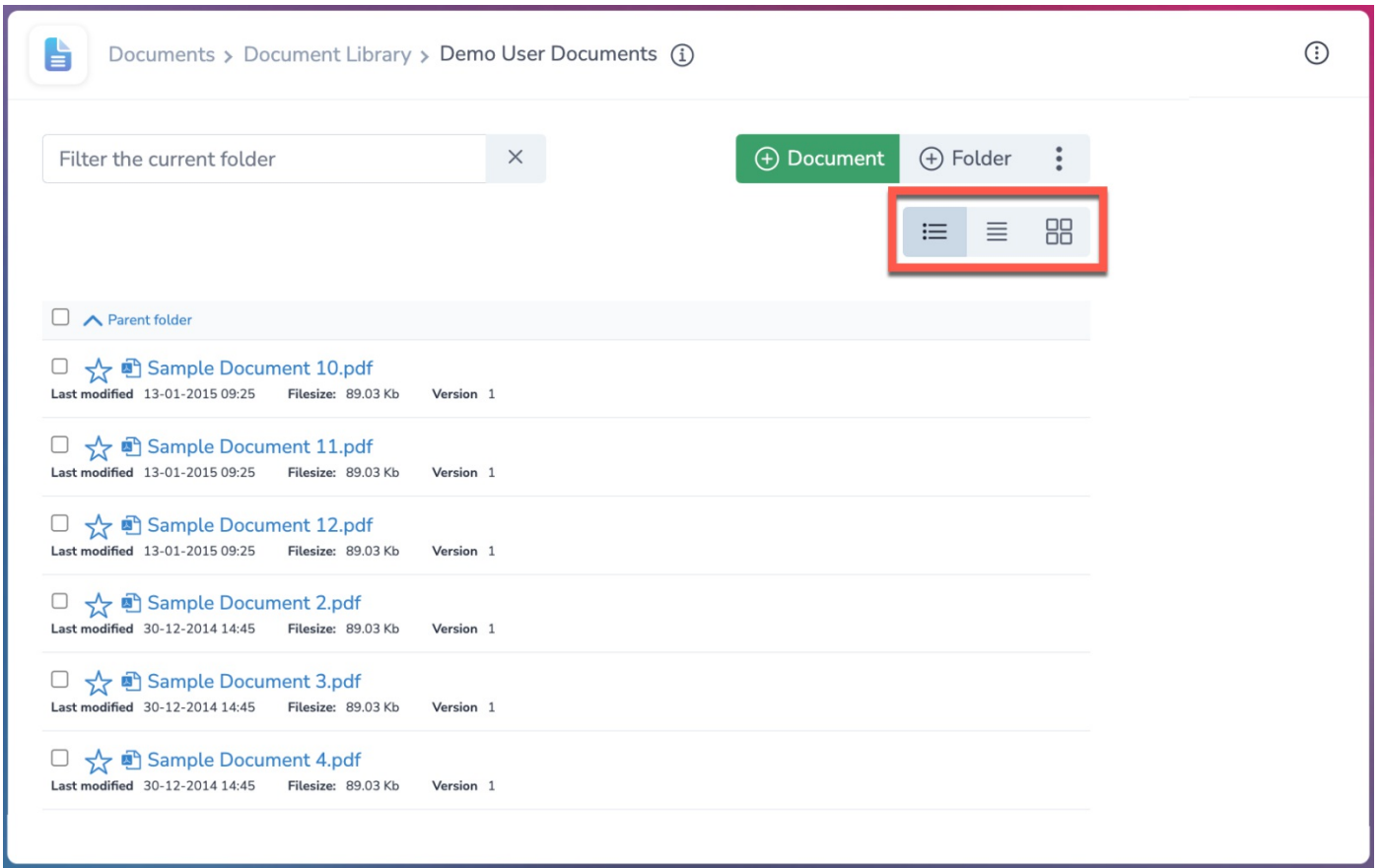
There are 3 different view options for folders & documents from the front-end: **Detailed List**, **Compact List**, **Thumbnail view**. The selected option will display as standard when a user first navigates to the Documents application.

Default view type for the documents list

Note, this works only until a user changes the view the very first time, after which the setting is stored in the user's profile.

Detailed list ▾

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.

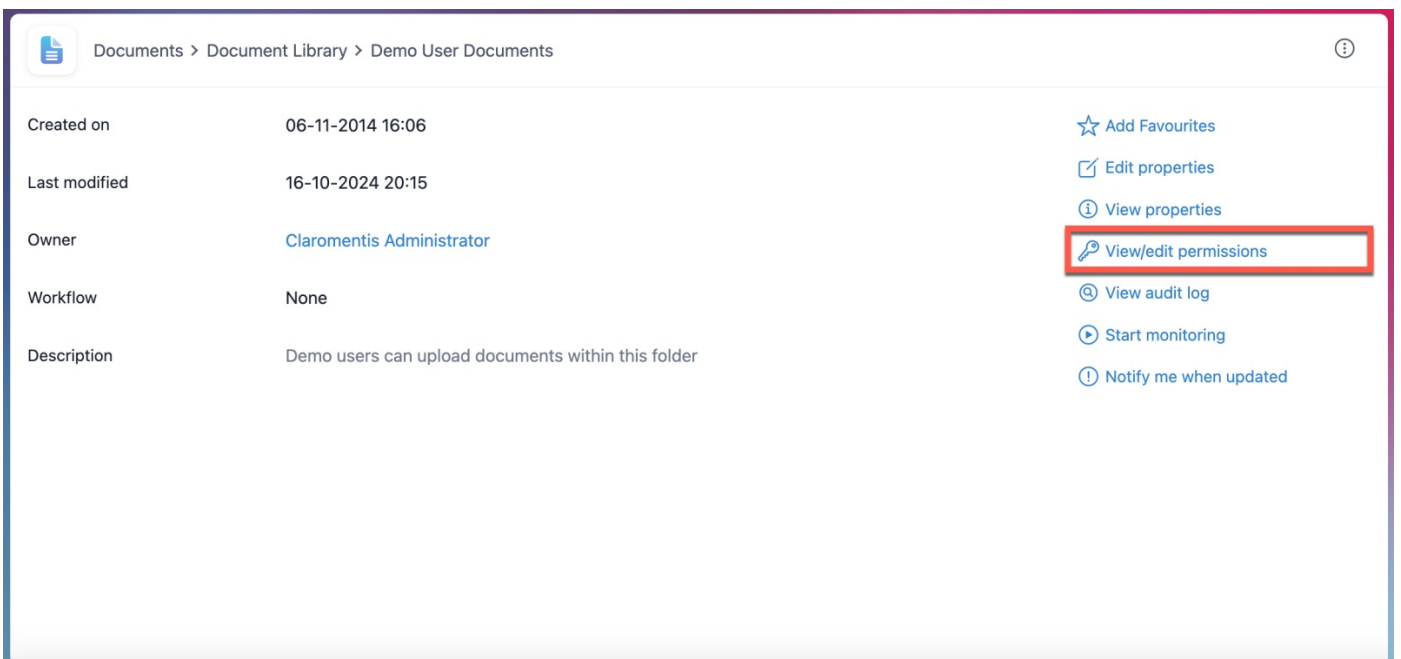
### People with only view rights can see permissions

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

People with only view rights can see permissions

Yes  No

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.

Show the recent views of a document in the details tab  
 Yes  No

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

Documents > Document Library > Demo User Documents > Sample Document 10.pdf

Sample Document 10.pdf ☆

Download document Check Out

Version 1

Microsoft W... 1 / 2 80%

Tel (+44) 1273 666355  
support@claromentis.com

claromentis  
support and services

1 LOREM IPSUM

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc pretium euismod varius. Nulla eleifend, dolor eget sodales ornare, ligula erat elementum eros, et accumsan odio nunc sed dolor. Curabitur malesuada sit amet lectus at euismod. Nullam lacus ante, pellentesque vel ipsum ut, vulputate aliquet erat. Praesent bibendum ac justo a porta. Quisque ullamcorper neque enim, blandit cursus turpis egestas vitae. Vestibulum tortor sapien, scelerisque in odio ut, blandit euismod augue. Proin id pharetra lectus. Morbi pellentesque rhoncus iaculis. Proin cursus ante ac mollis viverra. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Sed dolor purus, pulvinar ac dolor id, semper bibendum erat. Phasellus vel turpis quis enim congue laoreet at sit amet lacus. Aliquam ultrices commodo sapien sed feugiat.

1.1 LOREM IPSUM

Praesent hendrerit pharetra erat id vulputate. Donec ultrices malesuada ante in consectetur. Nunc vitae urna ac purus consectetur congue eget ac est. Aenean pretium ultricies leo, ut ornare ligula viverra sit amet. Sed accumsan eros massa, eu porttitor tellus blandit sed. Integer nibh ante,

Overview Comments 0

Review Date

Author

Last modified  
on 13-01-2022 09:25

Owner  
Claromentis Administrator  
Created on 13-01-2022 09:25

Viewed by  
Claromentis Administrator on 30 November 2022

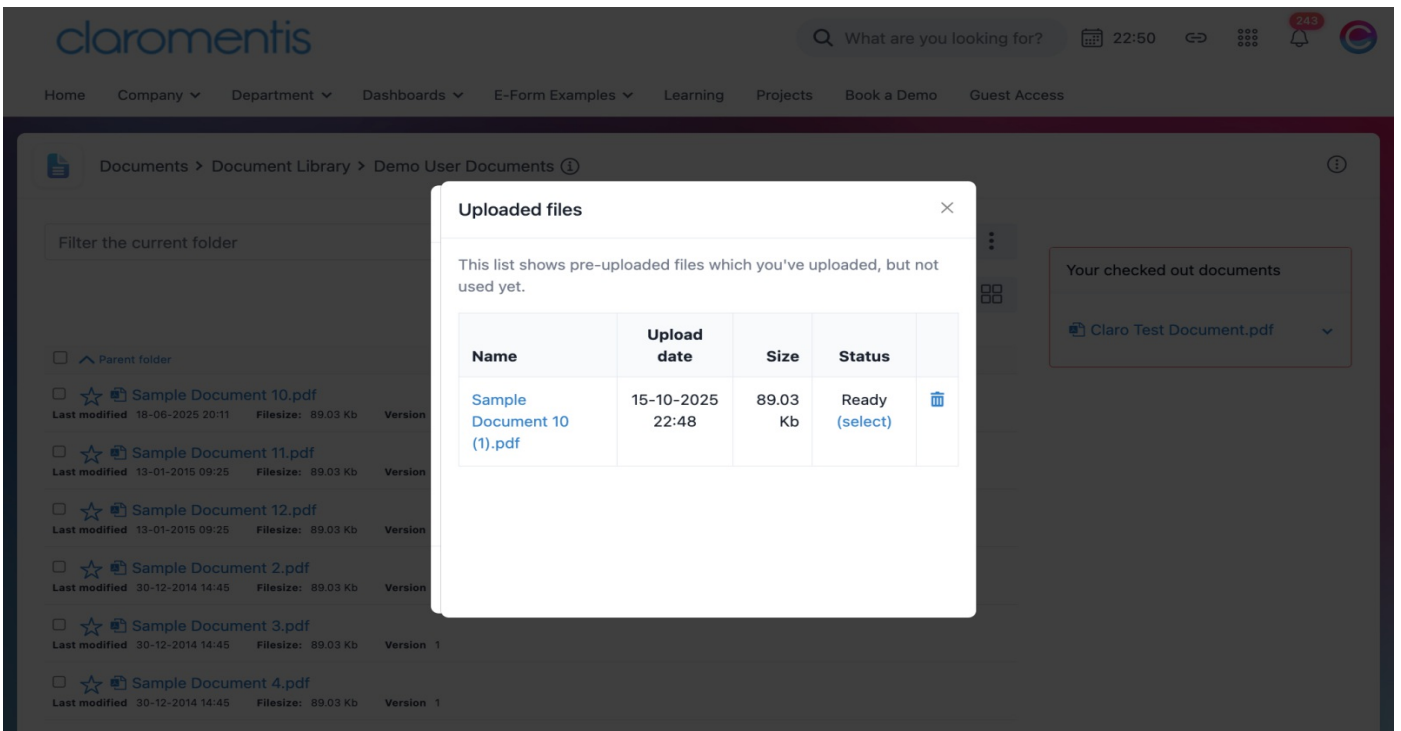
### Maximum age for uploaded files that have not been assigned to a document

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

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

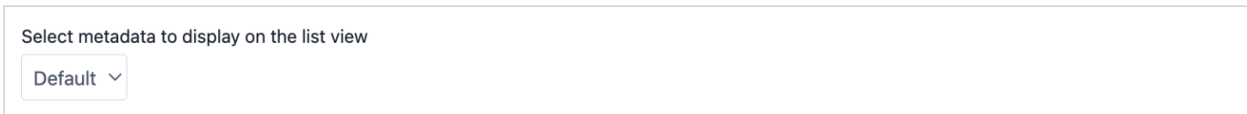
One month

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

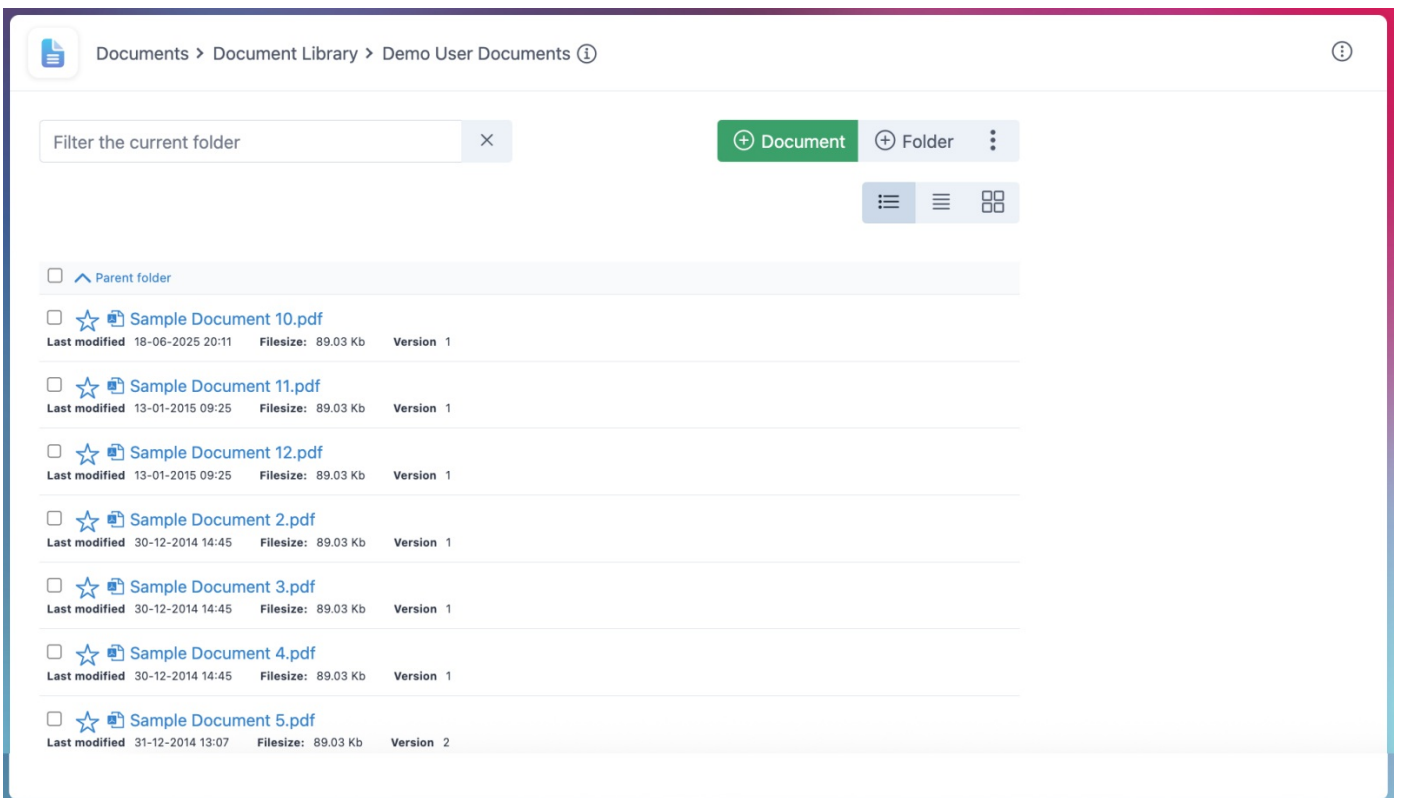


### Select metadata to display on the list view

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](#)