# Overview of Documents Preferences

Last Modified on 08/31/2023 3:14 pm EDT

> This guide elaborates on the Documents tab in the System Preferences module. It is intended for system administrators.

aACE provides useful management and organizational features for your company documents. Navigate from Main Menu > System Admin > System Preferences > Documents tab to configure these preferences.

Note: You must click Edit to update any of these settings and preferences.
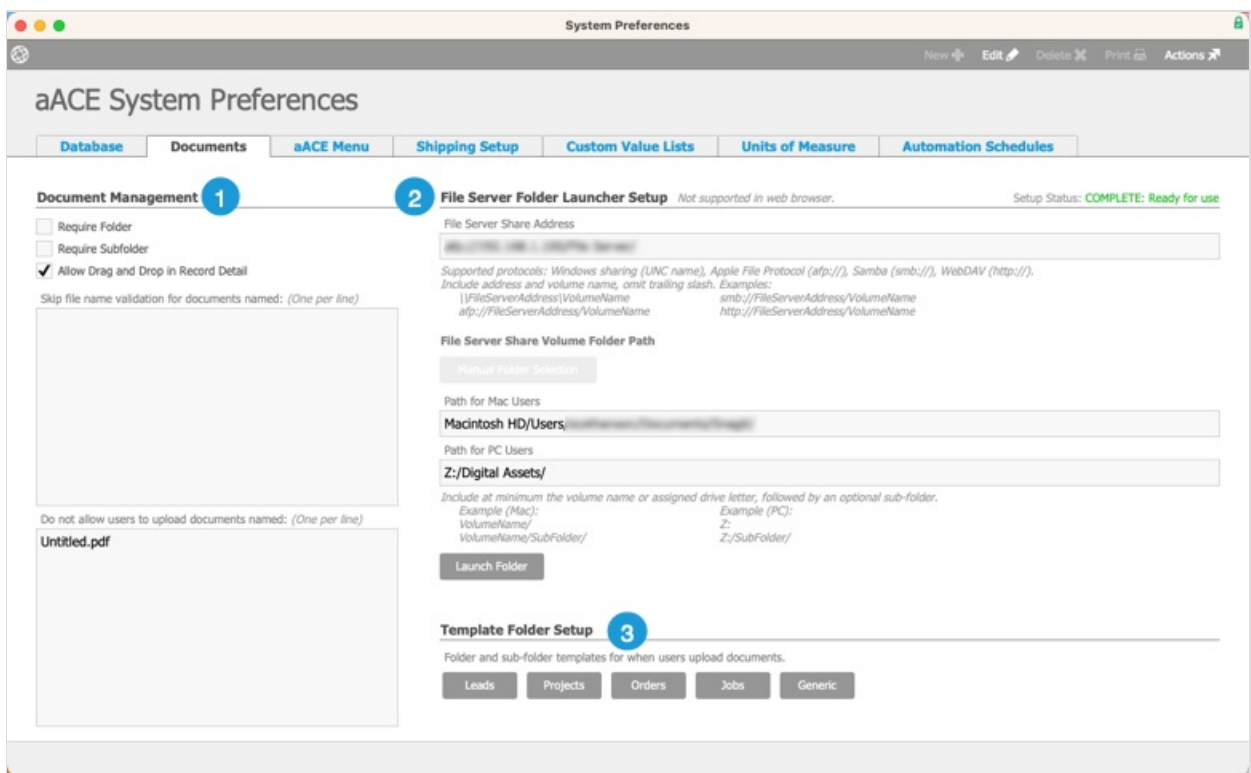
1. Document Management

You can configure settings for document management to best fit your company's document policy:

- Require Folder — Requires team members to specify a parent folder for each uploaded document
- Require Subfolder — Requires team members to specify a subfolder for each uploaded document
- Allow Drag and Drop in Record Detail — Enables team members to move a file icon onto

the aACE window to upload the file

File Naming Validations / Preventions

aACE allows you to configure requirements for file names.

By default, aACE validates the file name of each uploaded file. When a team member uploads a document that has a file name which matches a file already uploaded in your system, aACE stops the upload process. It then prompts the team member to adjust the upload in one of three ways:
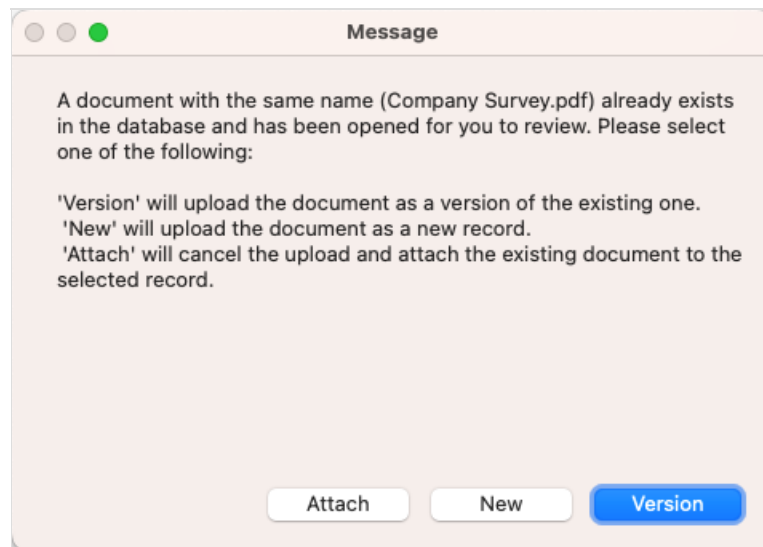
You can configure your system to modify this validation process to best suit your company needs.

You can specify document file names that the validation process should ignore. If a file name is listed in the 'Skip file name validation for documents named' text field, aACE will *not* check other uploaded documents for matching file names. aACE will *not* prompt team members with options to adjust the upload process. Instead aACE will automatically upload the file as a new record.

You can also specify file names in the 'Do not allow users to upload documents named' text field. aACE will *not* allow documents with any of the file names you enter here to be uploaded. Instead aACE will prompt team members to rename the files.

For more information on document uploads, read our guide on [Working with Documents](https://aace6.knowledgeowl.com/help/working-with-documents) (https://aace6.knowledgeowl.com/help/working-with-documents).

2. File Server Folder Launcher Setup

When you upload documents into aACE, a general rule-of-thumb is to upload smaller, "flat" files such as .docx or .pdf. However, if your files are larger or if you have too many to store in aACE, you can link your shared file server folder so users can access it through aACE. Additionally, you can access your file server folder using aACE when your business needs more detailed organization than the basic folder and subfolder options aACE provides.

You can specify the file server share address and folder path(s) in this section of the Documents preferences tab.

Once you set up your file server folder, aACE provides a Setup Status message to confirm if the setup was performed correctly.

3. Template Folder Setup

You can create template folders in your file server folder for each aACE record type. These record-specific folders can be accessed via their respective modules (e.g. you can access the Order template folder at the Orders module).