Overview of Documents and the Documents Viewer

Last Modified on 10/03/2023 12:08 pm EDT

> This guide provides an overview of the document detail view and the Documents Viewer. It is intended for advanced users.

The Documents module and the Documents Viewer work hand-in-hand for managing files and documents linked to various records in aACE. The module and the viewer are managed at two separate views.

Note: Any general list view or detail view icons will not be discussed below. For information on these icons, please read our help guides on the List View (https://aace6.knowledgeowl.com/help/overview-of-the-list-view) and the Detail View (https://aace6.knowledgeowl.com/help/overview-of-the-detail-view).

Document Record Detail View

You can view a list of *all* active documents currently uploaded to aACE by navigating from Main Menu > Internal > Documents. The detail view of a document record provides information and access to the documents and the related aACE records.

1. **Grouping** — Categorizes documents with Folders and Subfolders (see below)
2. **Version** — When uploading files, the Version field increments *after* you click Save on the document record.
3. **Public Access** — When marked, users from *any* department can view the document; flag marked by default
   Note: Clearing this flag restricts the file's visibility to team members in the same department as the file. This department is noted in the record footer. It can also be viewed by users in groups that have the '[Can View All Documents](https://aace6.knowledgeowl.com/help/understanding-record-access-privileges-in-user-groups-and-team-member-settings)' privilege.
4. **Current Version** — Click this file type thumbnail to work with the file based on the current mode:
   - View Mode — Downloads the current file
   - Edit Mode — Uploads a new version of the file and increments this version number
5. **File Versions** — Lists all versions that have been uploaded and provides links to perform various actions with the document versions:
   - View ( ) — Displays the file in a FileMaker temporary folder; this copy is deleted when you close FileMaker
   - Download ( ) — Saves a copy of the file to your workstation
   - Delete ( ) — Removes document versions from your aACE system
     Note: The line-level Delete icon deletes that version. The Delete icon *above* the list deletes all versions.
6. **Attached To** — Provides go-to links for associated aACE records
   Note: Clicking the Refresh icon ( ) will update the Attached To section with any new related records.

Folder / Subfolder Groups

The Folder and Subfolder fields provide an easy method for organizing documents. However, this functionality is *not* designed to provide an infinite folder structure.

You can specify a Folder and Subfolder when uploading documents via the Document Viewer or at the Document record. Your system administrator may set preferences to make these details required (Main Menu > System Admin > System Preferences > Documents > Document Management section). This can help maintain data integrity and proper grouping.

Documents attached via email integration (i.e. attachments on incoming emails) are automatically assigned to the Folder "Email Attachments" and a Subfolder of "[Month] [YYYY]".

Documents Viewer

The Documents Viewer shows documents currently attached to a specific record. You can also upload new documents here. Access a record's Documents Viewer by clicking the Docs icon (Docs 🖉) at a record's detail view.
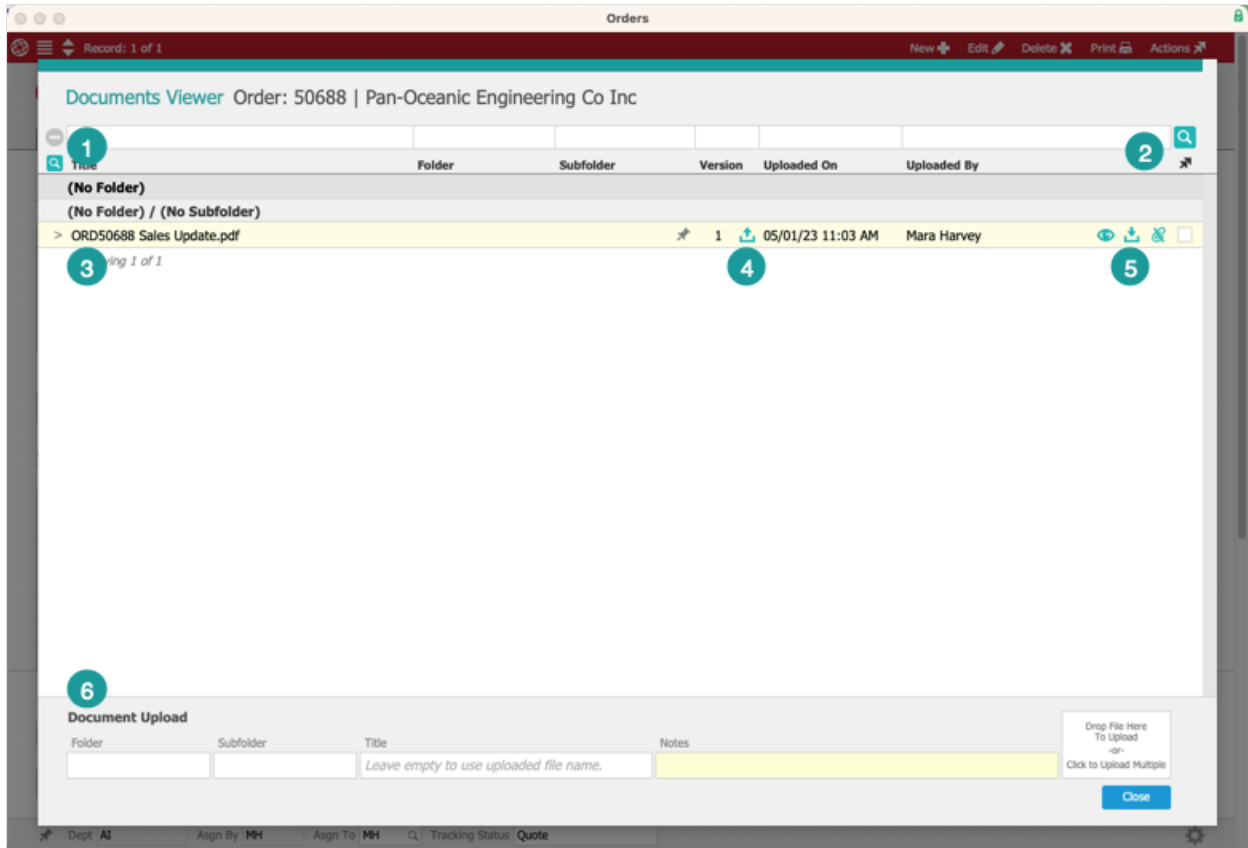
1. **List-Level Search** (🔍)— Displays the Documents Selector so you can link to documents that have *already* been uploaded to aACE.
2. **Quick Search** — Searches through files that are attached to the *current* aACE record
3. **Record Title** — Provides a Go-To (>) link to the document's detail view in the Documents module
4. **Version** — Shows the document's version number and allows you to upload a new *version* of the file using the Version Upload icon (⬆)
5. **Record-Specific Links:**
    ◦ View (👁) — Displays the file in a FileMaker temporary folder; this copy is deleted when you close FileMaker
    ◦ Download (⬇) — Saves a copy of the file to your workstation
    ◦ Detach (⚒) — Removes the file from the current record
      Note: This does *not* remove the file from aACE. To completely remove a file, you must locate it in the Documents module, deactivate it, then delete it.
6. **Document Upload** — Uploads and attaches new files to the current aACE record

Enter the needed info in the Document Upload section, including any required fields highlighted in pink. Then drag-and-drop the file on the designated area.