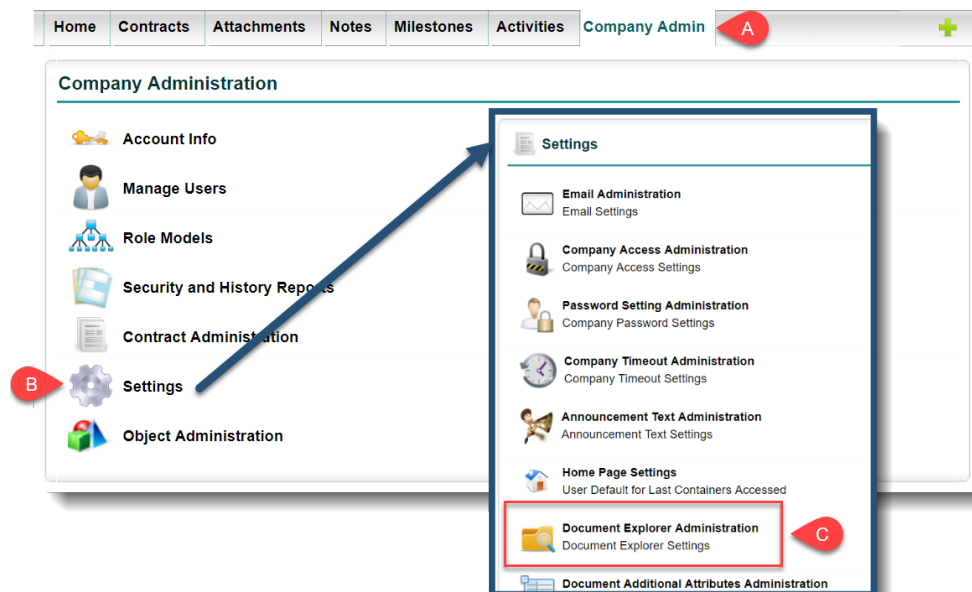# Document Explorer

When viewing your Attachments inside of a Contract Container, the more that are there, the harder it can be to find quickly. The UCM "Grid" is a great tool for sorting and viewing lots of important information, but sometimes, you just need to find a simple document and don't need all that "other stuff". Enabling and using our **Document Explorer View**, is a great way to quickly and easily move back and forth between two different styles of viewing your Attachments.

Enabling Explorer View:

- To begin, we must enable our Document Explorer View by going to **Company Admin (A)** in the Enterprise Ribbon
- Then to **Settings (B)**
- And scroll down a bit to **Document Explorer Administration (C)**

- Once inside, simply check the box next to **Document Explorer Option is Enabled? (1)**
  - o *Optionally, you can change the name of the parent folder (2) , by default its set to* ***Documents***
- And click **Save (3)**
- After Saving, **Log Out** and **Log In** to allow the change to take effect **(4)**

Toggling Explorer View:

- Once you have it enabled, head into any **Contract Container** and go to the **Attachments Tab (A)**
- You'll now see two icons and a toggle switch in the middle of your tab **(B)**
- This allows you to toggle between the two view types for your attachments:
  - **File Explorer View (C)**
    - Operates like any File Explorer on a PC
    - See just the file name for ease of searching through multiple attachments
    - Custom Sub-Folders for better organization
    - Movable through Drag and Drop
    - Set on a Per-Contract Basis:
      - *No where to set Global Sub-Folders since each individual Containers needs can vary greatly.*
  - **Grid View (D)**
    - "Classic" UCM view
    - Sort or Group by any column
   - Holds much more information than just the file name
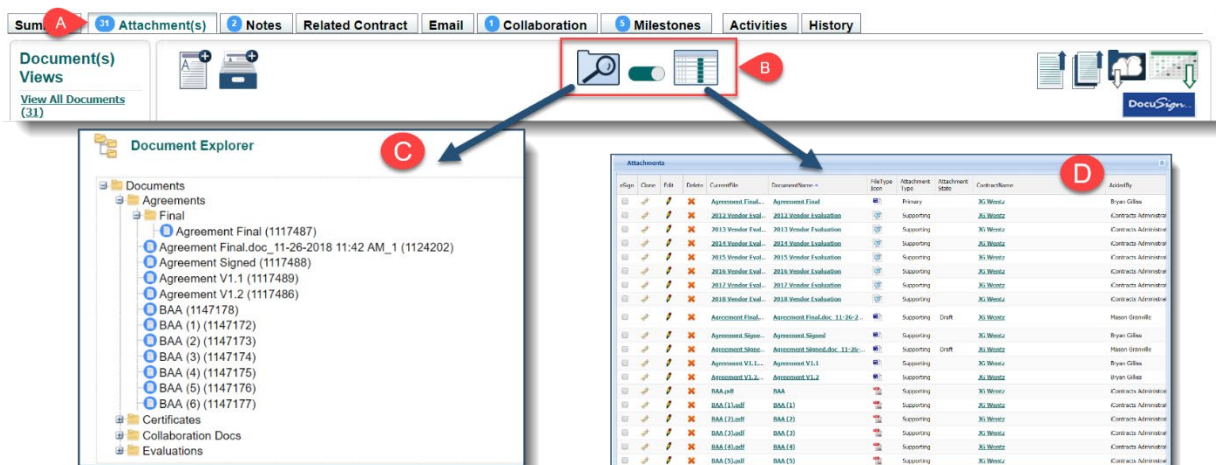
Setting Up Your Explorer View Folders:

- You will always have your default **"Documents"** folder (or whatever you choose to name it) at the top
- To make your **Sub-Folders**, and any Sub-Sub-Folders, just **right click** on a Folders name and select **Add (A)**
  - *To change the name of any Sub-Folders, right click and select **Edit** (B)*
- To move any Attachment to a new or different folder, just **Drag and Drop**
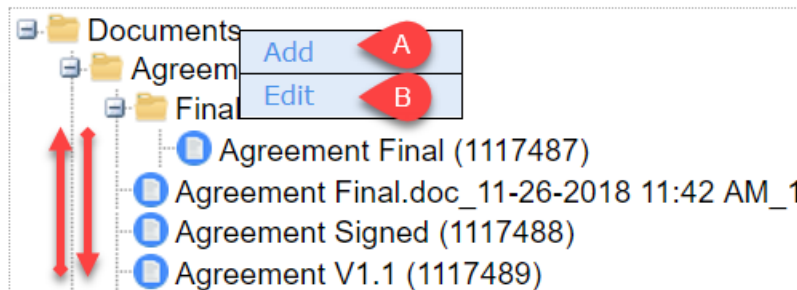
Deleting a Folder:

- If you ever need to Delete a Sub-Folder, right-click on the folder name and select **Delete (1)**
  - *ONLY Sub-Folders can be deleted. The parent "Documents" folder is always there*
- Deleting a Sub-Folder **DOES NOT** delete the attachments. They are simply moved back into the default "Documents" folder after a quick page refresh.
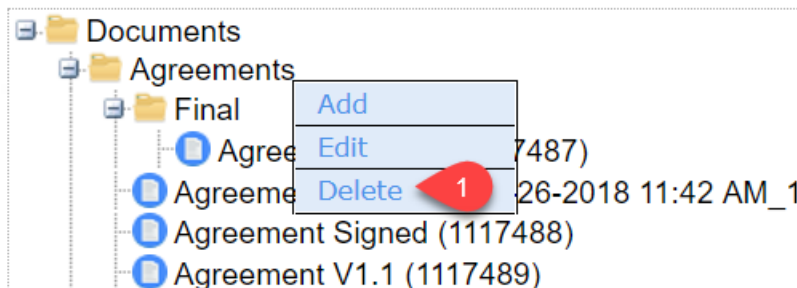
Persistent View:

Even though there are no Global options for Folders or Folder Set-Up, UCM does remember your last view setting (Grid or File Explorer), and will keep that view set regardless of the Contract Container. You can or course just toggle back to the other view whenever you'd like by just clicking the icons above.