

S-Drive Configuration for Salesforce.com Communities v1.23

Important Note

This guide contains information about Salesforce Communities for S-Drive. Refer to the S-Drive Installation Guide, S-Drive Advanced Configuration Guide and S-Drive User Guide for more information about installing/ configuring S-Drive product.







Contents

Α.	Ena	bling Communities for Your Organization	2
B.	Crea	ating a New Community	3
C.	Con	figuring S-Drive for Community	4
D.	Edit	ing Community Profile Permissions	6
	1.	Example 1: Just Read Permission Enabled	7
	2.	Example 2: Read, Create and Edit Permissions Enabled	.8
	3.	Example 3: Read, Create, Edit and Delete Permissions Enabled	9
	4.	Permission Combinations That Are Not Supported	10
	5.	Other Issues	10
E.	S-Dr	rive Support	10





A. Enabling Communities for Your Organization

App Setup						
Customize						
Tab Names and Labels						
▶ Home						
Activities						
Chatter						
Communities New!						
Settings						
Figure 1						

Click Setup -> App Setup -> Customize -> Communities -> Settings (Figure 1).

In the "Communities" page, first check "Enable Communities" checkbox. Then type a unique domain name that will be used in all your communities. Note that this name can't be changed after you save it. Click "Check Availability" button and if "Success" message is shown click "Save" button (Figure 2).

Communities
Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. Learn more
To get started with communities, you must first enable it and select a domain.
Save
Enable communities
Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. Learn more 🕼 Enable communities
Select a domain name
Important: The domain name will be used in all of your communities and can't be changed after you save it
Sample Community URLs MyCompany.force.com/customers MyCompany.force.com/developers MyCompany.force.com/artners Domain name cyangate-test -developer-edition.na7.force.com Check Availability Save

Figure 2





B. Creating a New Community

Once you enable Communities for your organization, you can create new communities (Figure 3). You can click "New Community" button to create a new community.

Manage Communities						
Success! You can now create new communities.						
The list shows all communities in your organization. Clicking on the Community Name link	akes you directly to the Community. If you're not a member, the Community Name is not a link.					
All Communities New Community						
No Communities						

Figure 3

Type in the details of the new community and click "Create" button (Figure 4).

Create Community	x					
* Name	Test Community					
Description	Testing S-Drive features in Salesforce Communities					
URL	cyangate-test-developer-edition.na7.force.com / test					
After creating a community, you can continue to customize it. It is visible only to administrators until you publish it or share the URL.						
	Create					

Figure 4

Once you click the "Create" button community will be created in a few seconds (Figure 5).

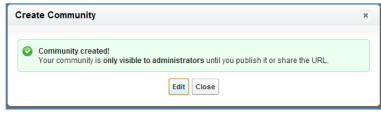


Figure 5





C. Configuring S-Drive for Community

After creating the community click the "Edit" button to configure the newly created community (Figure 6).

Test Community: Community Settings						
Let us know what you think Help 🥹						
A Members	Getting Started	Dismiss				
Tabs	select the tabs you want to display brand your community, go to Bran	ommunity, you need to add members and ou want to display. To further customize and nunity, go to Branding, Login Page and Emails o community when it's ready to go live.				
🤭 Branding	Let us know what you think Help Members Tabs Branding Let us know what you think Help Cetting Started Dismiss					
🚽 Login Page	Testing S-Drive features in Salesforce Communities					
Emails	intepetine) angute te					
	Status Preview					
	Publish					
Close						



Click "Tabs" section and select the "S-Drive" tab to display in the Community pages. You can also select S-Drive Attachments containing standard/custom object tabs and click "Save" button (Figure 7).

Test Community: Tabs			×					
			Let us know what you think Help 🔞					
Select tabs to include in this com	munity.							
Standard sharing rules app	ly to all records. I	earn more						
Available Tabs		Selected	l Tabs					
Accounts Campaigns Console Contacts Content Contracts Dashboards Data.com Files Groups Home Ideas Leads Libraries	Add Remove	Chatter Cases S-Drive	Up A Vown					
Save								





Below is a sample Community screen with Case Files enabled:

Test Community	·						Community User -
Test Community						Search	Search
Chatter Cases Test Objects	S-Drive						
Create New	Case 00001000						Printable View Help for this Page 💡
Recent Items	+ Hide Feed						
00001000	🗭 Post 🏢 File 🖉 New Child C 🛛	Aore 👻					
Recycle Bin	Write something	Share	Follow Followers				
-	Q Show All Updates ~		No followers.				
	There are no updates.						
	< Back to List	Solutions	01 Open Activities (0) Emails (0	1 Activity History (0) Case Comments (0)	Attachments [0] Case His	atory (0)	
	Case Detail		Close Case Clone				
	Case Owner Case Number	Demo CvanGate [Change]			Status Priority	Closed	
		Rose Gonzalez				(512) 757-6000	
		Edge Communications			Contact Email	rose@edge.com	
		Electrical			Case Origin	Phone	
		Equipment Complexity					
		12/14/2009 1:12 AM GC5040			Date/Time Closed	10/25/2008 11:59 AM	
	Product Potential Liability				SLA Violation		
		Demo CyanGate, 12/14/2009 1:12 AM				Demo CvanGate, 12/14/2009 1:12 AM	
		Starting generator after electrical failure					
	Description						
	Custom Links	Up-sell / Cross-sell Opportunity					
		Edit	Close Case Clone				
	Solutions View Suggest	ed Solutions or Fin	d Solution				
	No Solutions Attached						
ſ	Case Files	New F	older Upload File(s) Attach	from S-Drive Foldera Email Selected	elete Selected		
	Home					1	fotal Items: 1 (Search Q)
	Actions T File Name	•	Created Date	Created By ID Description File Size Case	Case File Name Delet	ted Last Modified By ID Last Modified Date Record	
	E Item Actions - Commun	ity Folder	1/13/2014 5:49 AM	Community Folder 0 bytes 000010	00 201401-145	Community User 1/13/2014 5:49 AM a05A00	0000Cn6TH 1/13/2014 5:49 AM
			0.49788	Market.			Total Items: 1

Figure 8





D. Editing Community Profile Permissions

To enable profiles for selected community use the "Members" section in the "Community Settings" page (Figure 6).

Based on the profile of the community user, users can have different permissions in S-Drive.

If you try to access the community with no permissions you'll see "You do not have permissions to access S-Drive data!" error when you click the "S-Drive" tab (Figure 9).

Test Co	mmunity	
Test	Commu	nity
Cases	S-Drive	
You do no	t have pern	iissions to access S-Drive data!
		Figure 9

If you just enable "read" feature, community users will just be able to download or email uploaded files by internal users. They won't be able to upload a file, delete a file, create a folder or edit an item's description. Also note that visibility of the files list, buttons and menu items are affected via sharing and S-Drive Configuration.

To set these permissions edit the selected profile using the Administration Setup -> Manage Users -> Profiles menu. Click on the name of the profile you want to edit (Figure 10).

Edit Profiles	Assigned Profiles Help
	Users
	3
	Edit Profiles

Figure 10

In the new window click Edit button to edit the user permissions (Figure 11).

Profile Portal Manager Clone	Help for this Page 📀					
< Back to List: Users Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.						
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.						
Enabled Apex Class Access [11] Enabled Visualforce Page Access [5]						
Profile Detail Edit Clone Delete Viev Users						
Name Portal Manager Clone User License Customer Portal Manager Edit Custom Profile ✓						



Scroll down to the "**Custom Object Permissions**" section. You'll see the "**Basic Access**" selections for "**S3Objects**" custom object (or if you're working on S-Drive Attachments like Cases, Accounts, custom objects etc. you need to edit the custom object file's permissions). You will need to check/uncheck these boxes based on your needs (Figure 12). Note that you can edit "Custom Object Permissions" for just "Custom Profiles". You may need to *clone* your standard profile to be able to edit a community profile. Refer to the Salesforce.com documentation for more information.

6





There are four access levels: **Read, Create, Edit, and Delete**. We'll see examples of these access level combinations in the subsections.

	Basic Access	Basic Access				Data Administration		
	Read	Create	Edit	Delete	$\operatorname{View}\operatorname{All}_i$	Modify All		
\$30bjects								
Case Files	V							
Figure 12								

You can set access levels for customers using communities. We strongly suggest you to just set the "Read" access to the community users for data security.

1. Example 1: Just Read Permission Enabled

If you just set "Read" and unset other permissions for selected custom object (here S3Object) (Figure 12), your community users won't be able to:

- upload files
- create folders
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders.

They will be able to:

- browse folders
- download files
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "Email" and "Download File(s)" buttons will be displayed (if Download Manager is enabled) for community users and for each file "Download" and "Copy URL" item menu actions will be visible. "Item Actions" menu will be hidden for folders (Figure 13).



					Search	h Q
lome						
Actions	I	File Name A	Created Date	Created By ID	Description	File Size
		Company Invoices	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions -	X	Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Download Copy URL		Demo TXT Document.bt	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes



2. Example 2: Read, Create and Edit Permissions Enabled

If you set Read, Create, Edit permissions and unset Delete permission for selected custom object (here S3Object) (Figure 14), your community users won't be able to:

- delete files/folders
- cut/copy files. _

S:\

	Basic Access			Data Administ	Data Administration		
	Read	Create	Edit	Delete	View All	Modify All	
\$30bjects		V					
Case Files		V					

Figure 14

They will be able to:

- upload files _
- create folders
- browse folders _
- download files
- rename files/folders -
- edit descriptions of files/folders -
- email files _
- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email" and "Download File(s)" (if Download Manager is enabled) buttons will be displayed for community users and for each file "Download", "Edit", "Rename" and "Copy URL" action menu items will be visible. "Edit" and "Rename" action menu items will be visible for folders (Figure 15). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

8





Home				Search	n Q
Actions	<u>T</u> <u>File Name</u> .▲	Created Date	Created By ID	Description	File Size
Item Actions -	Company Invoices	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions -	Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Download Copy URL Edit Rename	Demo TXT Document.txt	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes

Figure 15

3. Example 3: Read, Create, Edit and Delete Permissions Enabled

If you set Read, Create, Edit, Delete permissions for selected custom object (here S3Object) (Figure 16), your community users will be able to:

	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
\$30bjects	V		V			
Case Files	V		V			

Figure 16

- upload files
- create folders
- browse folders
- download files
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email", "Download File(s)" (if Download Manager is enabled), "Cut", "Copy", "Paste" and "Delete File(s)" buttons will be displayed for community users and for each file "Download", "Edit", "Copy URL", "Rename" and "Delete" item menu actions will be visible. "Edit", "Rename" and "Delete" action menu items will be visible for folders (Figure 17). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

Home	×				Search	n Q
Actions	I	File Name A	Created Date	Created By ID	Description	File Size
Item Actions +]	Company Involces	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions -	X	Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Download Copy URL Edit		Demo TXT Document.txt	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes
Rename	\mathcal{D}					

Figure 17





4. Permission Combinations That Are Not Supported

Permission combinations other than above examples are not supported by S-Drive and we strongly recommend you not to use unsupported permission combinations.

5. Other Issues

If you get an "INVALID FIELD" error message like below while uploading a file after giving required permissions you may need to check the "Field Accessibility" settings for the selected profile under Administration Setup -> Security Controls -> Field Accessibility menu:

Operation Failed
INVALID_FIELD: Select s.Id, s.cg_WIP_c, s.CreatedById, s.CreatedDate ^ ERROR at Row:1:Column:14 No such column 'cg_WIP_c' on entity 'cg_S3Object_c'. If you are attempting to use a custom field, be sure to append the '_c' after the custom field name. Please reference your WSDL or the describe call for the appropriate names. [object Object]
ОК



"Hidden" fields for the selected custom object (here S3Object) needs to be set as "Visible" from this menu.

E. S-Drive Support

You can contact S-Drive Support Team for any questions or problems that you couldn't solve using S-Drive documents:

- 1. Open a Ticket at Support Site: <u>http://sdrive.cyangate.com/support/</u>
- 2. Email: sdrive@cyangate.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page: <u>http://www.cyangate.com/products/s-drive-for-salesforce-com/</u>