# 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.

**CyanGate**

*www.cyangate.com*

# Contents

## A. Enabling Communities for Your Organization

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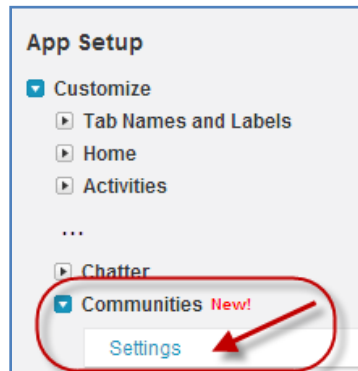
Figure 1

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).
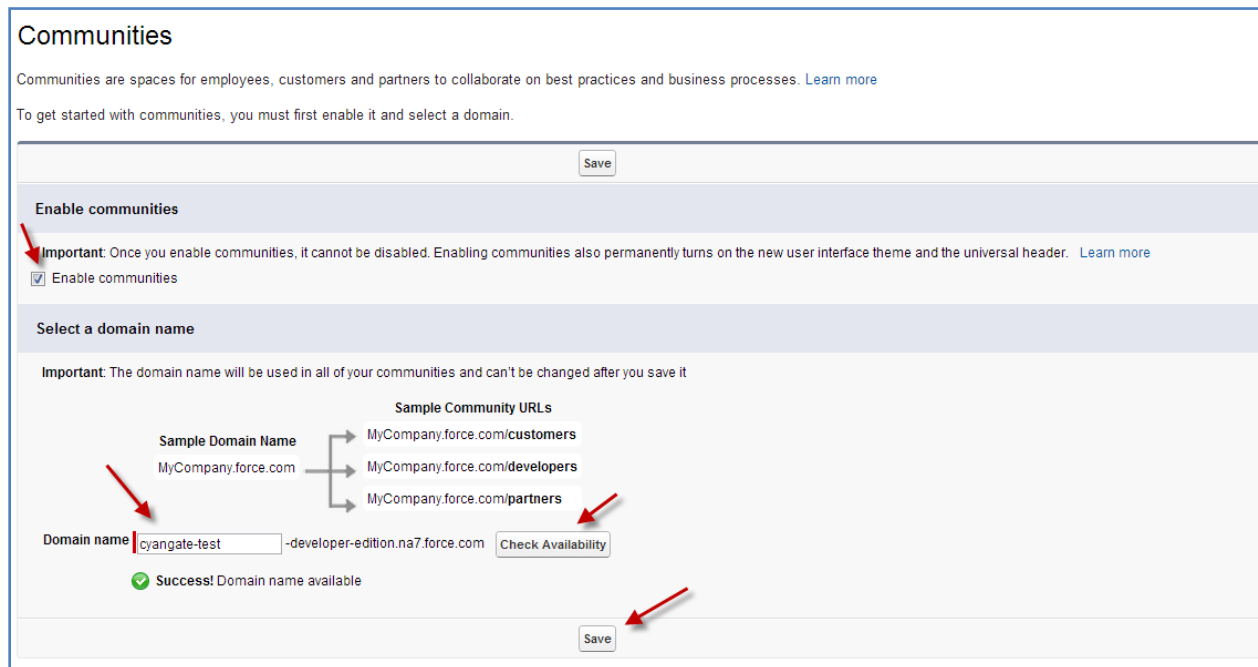


Figure 2

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## 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.
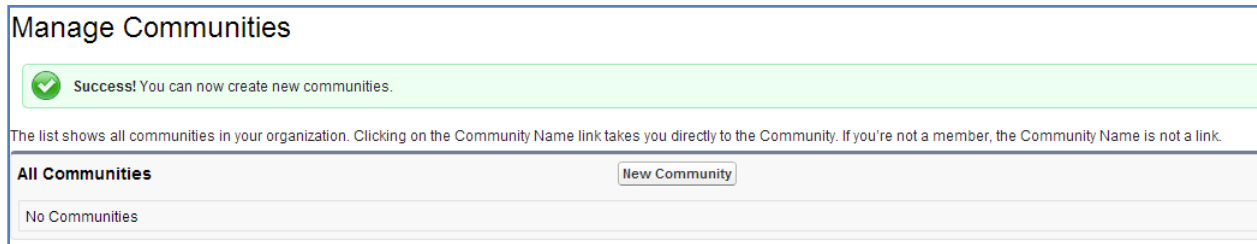


**Figure 3**

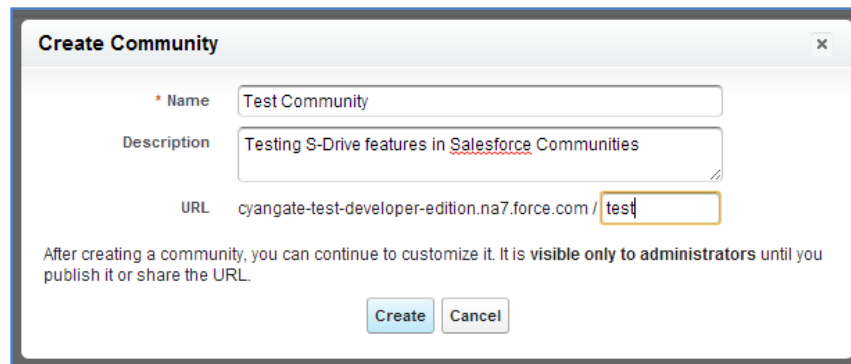Type in the details of the new community and click "Create" button (Figure 4).



**Figure 4**

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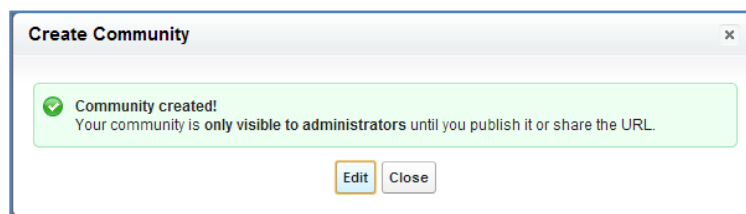


**Figure** 5

## C. Configuring S-Drive for Community

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



**Figure 6**

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).



**Figure 7**

Below is a sample Community screen with Case Files enabled:



Figure 8

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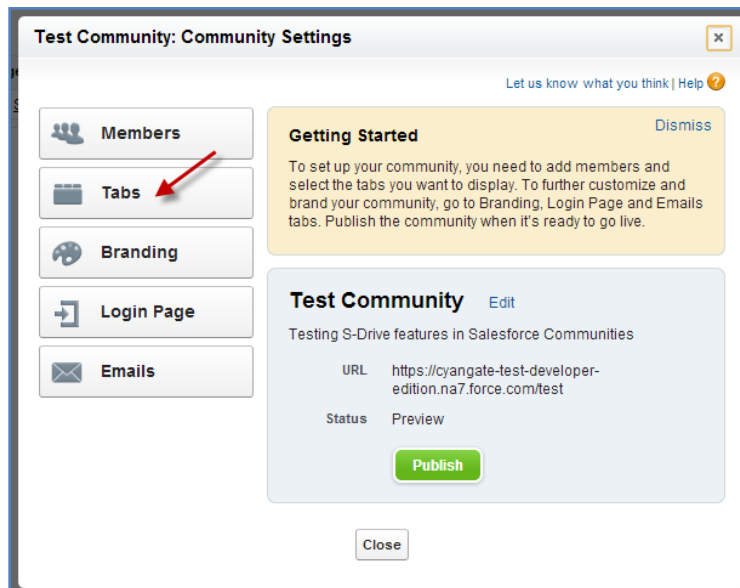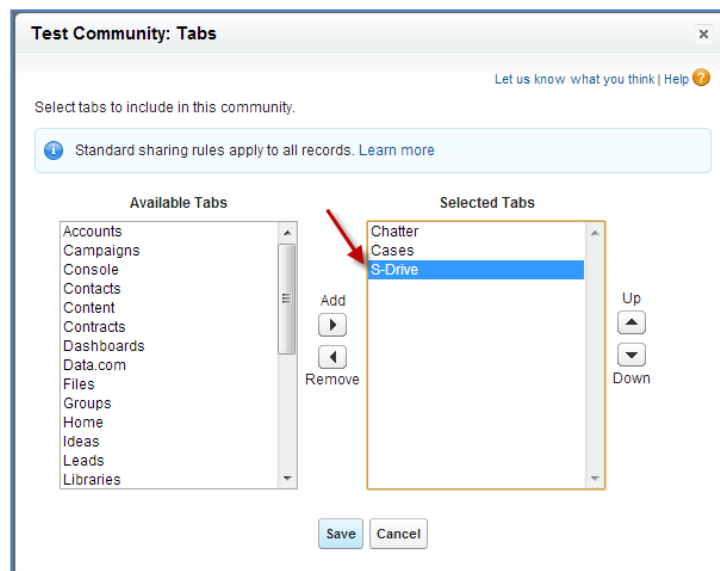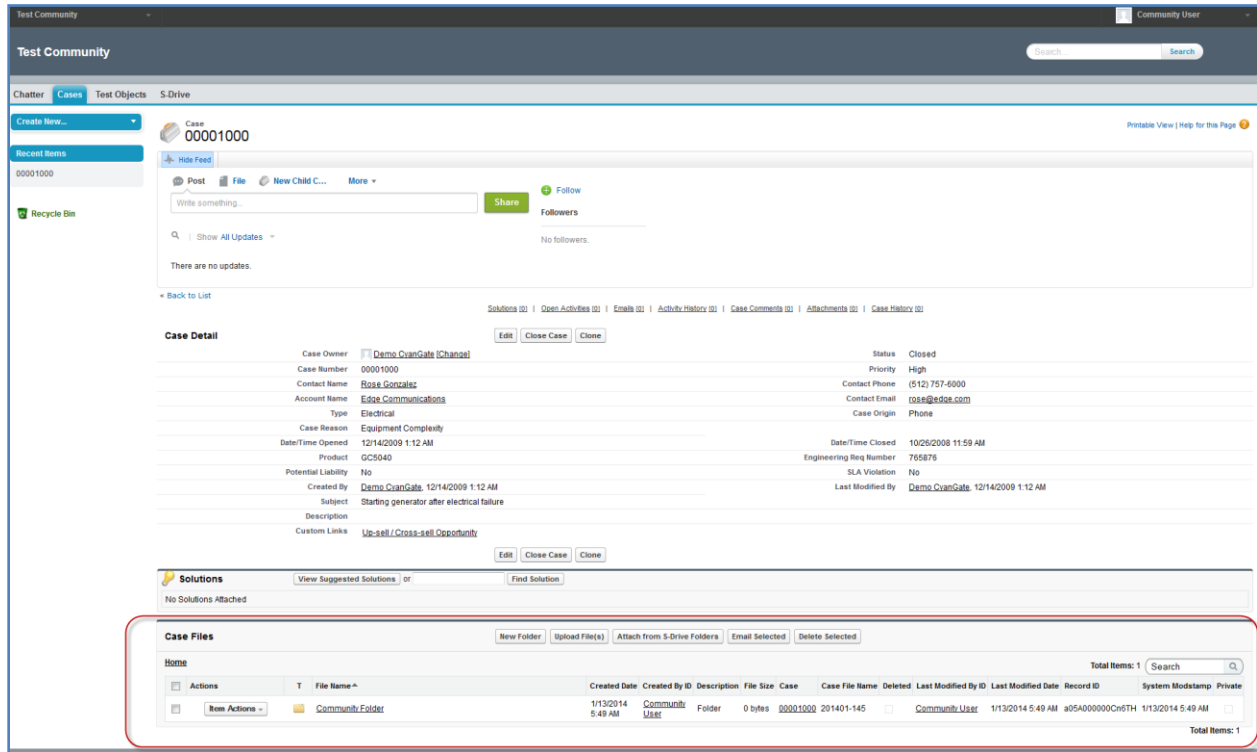
To enable profiles for selected community use the "Members" section in the "Community Settings" page (Figure 6).

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).
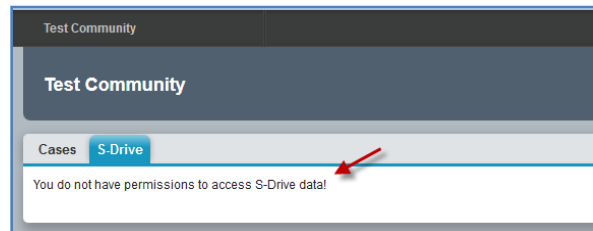


**Figure 9**

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).
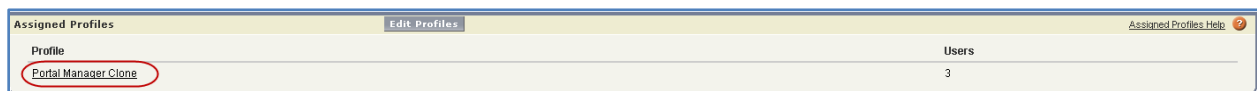


**Figure 10**

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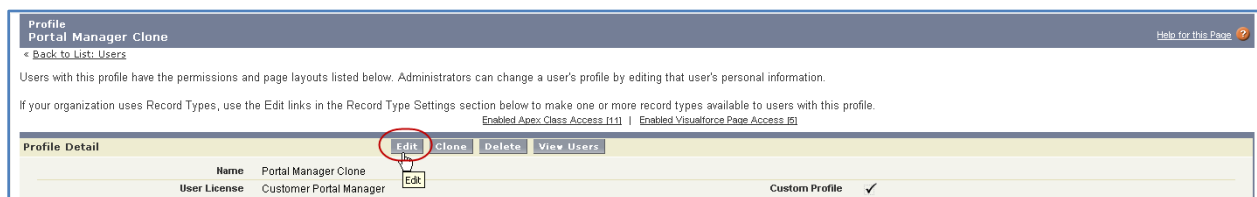


**Figure 11**

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.

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

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).
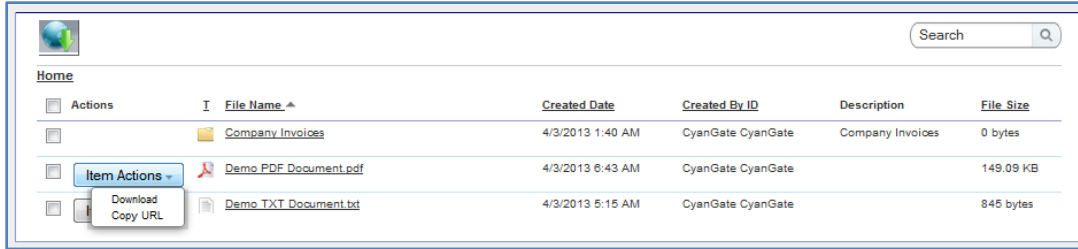
**Figure 13**

## 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.



**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.

**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:



**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.
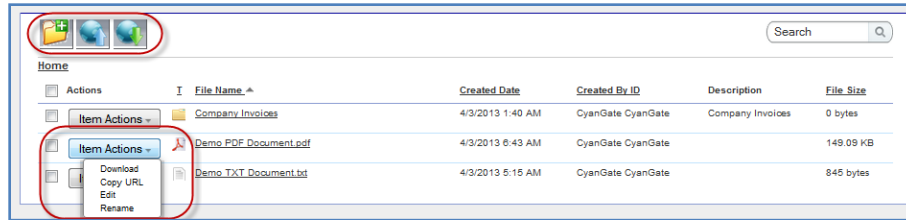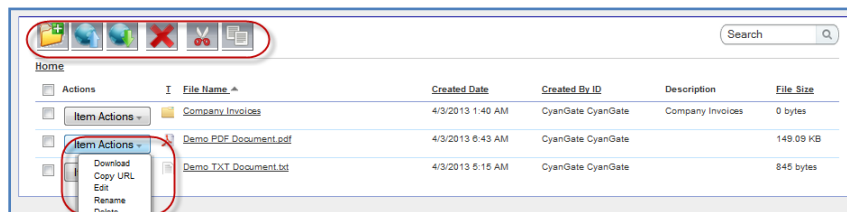


**Figure 17**

### 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:
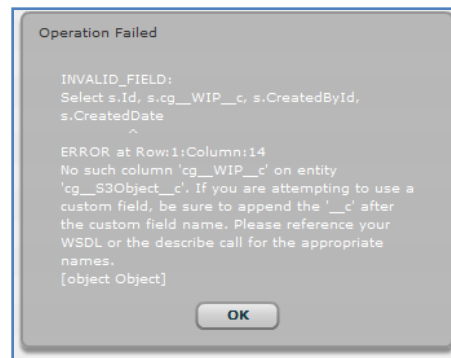


Operation Failed

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]

OK

**Figure 18**

"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: http://sdrive.cyangate.com/support/

2. Email: sdrive@cyangate.com

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