

# S-Drive Installation Guide v1.23

#### Important Note

This installation guide contains basic information about S-Drive installation. Refer to the S-Drive Advanced Configuration Guide for advanced installation/configuration topics and S-Drive User Guide for more information about using S-Drive product and S-Drive API calls.





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### S: A. Installation

1. Go to "S-Drive Product Page" (sdrive.cyangate.com). And click "Get It Now" (Figure 1).





Overview	Details	Reviews 11	Provider		🆤 Save	€ Get It Now
			To get this app, select one	of the below options		
			Login to the AppExchange Use your Salesforce credentials	I don't have a login Continue as a guest		
Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.						
	Figure 2					

3. After login you'll be asked where to install: "Install in production" or "Install in sandbox". Select the appropriate option based on your needs (Figure 3).

Overview	Details	Reviews 11	Provider		🎔 Save	€ Get It Now
				How would you like to continue?		
				Install in production Includes active, trial or developer orgs		
				Install in sandbox		

- Figure 3
- 4. Review "What You are Installing" and "Where You are Installing" sections in the next screen. Read the "terms and conditions" and then check "I have read and agree to the terms and conditions" checkbox and click "Confirm and Install!" button. (Figure 4).

			→ Get It Now
		Almost there!	
	<i>i</i> Before installing, please review the <u>customiz</u> configuration steps for this application.	ation guide to familiarize yourself with the installation and	
	WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING	
	PACKAGE S-Drive Unlimited and Secure, File Storage and Distribution		
	VERSION SDrive (1.22/ 1.22)	EDITION USER NAME	
	SUBSCRIPTION Free		
	DURATION Does Not Expire		
	NUMBER OF SUBSCRIBERS Site-wide		

- 5. Login to your production (or sandbox organization based on your previous selections) account again in the next screen.
- 6. Review the "Package Installation Details" and "Package Components". Click "Continue" (Figure 5).

Package Name	SDrive
Version Name	1.22
Version Number	1.22
Publisher	CyanGate
Description	S-Drive is an easy. secure and unlimited file storage and distribution platform. No more attachments or FTP. iust send a link. Collect your company knowledge securely on Amazon S3 Cloud Storage.
	Access anywhere, anytime. Continue Cancel

- Figure 5
- 7. Approve third-party access by checking "Yes, grant access to these third-party web sites" option and clicking "Continue" button (Figure 6).

Appro	ove Third-Party Access	×
Ø	This package may send or rece websites. Make sure you trust th <u>are unsure?</u>	
	Website	SSL Encrypted
	ls.amazonaws.com	✓
	s3.amazonaws.com	$\checkmark$
	sdrivesync.cyangate.com	<b>√</b>
	Ves, grant access to these t	
	Figure 6	5

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8. Review "Approve Package API Access" details and click "Next" (Figure 7).

ackage Custom Objects Is Package will have the user's ag	case (via the API	) to all Custom (	biecte in vou	r Organization					
ctended Object Permissions		) to all oustoin c	ojecia in joc	ar organization.		_	_		
	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	1	1	1	✓	Ideas	1	1	1	1
Assets	1	1	1	1	Leads	1	1	1	1
Campaigns	1	1	~	1	Opportunities	~	1	~	1
Cases	1	1	1	1	Price Books	1	1	1	1
Contacts	1	1	1	1	Products	1	1	1	1
Contracts	1	1	1	1	Solutions	1	1	1	1
Documents	1	~	1	1					
Documents eral User Permissions tackage will be able to use all									

	~		-	~	_	
- 11	2	u	n	е		
	0			-		

 If you're installing S-Drive to a Salesforce *Enterprise* or *Unlimited* organization you'll see security level options screen (*Professional* organization users will not see this screen). Select "Grant access to all users" for the "Choose security level" step and click "Next" (Figure 8).

Step 2. Choose security leve	1			Step 2 of 3
Select security settings	Best for limited deployments. Users with your profile will have full access. All user profiles will have full access			
<ul> <li>Grant access to all users</li> <li>Select security settings</li> </ul>	Recommended for most packages	Previous	Next	Cancel

Figure 8

10. Select "Install" for the last step (Figure 9).

Step 2. Install Package	Step 2 of 2
The package is ready to be installed. Click Install to continue.	<u>\</u>
	Previous Install Cancel
Figure 9	

11. If you see "Install Complete" screen, installation is completed (Figure 10). You can continue with the 'Displaying "S-Drive" and "S-Drive Configuration" Tabs' section.

					CyanGa
Package Details SDrive (Managed) « Back to List: Installed Package					
Follow any remaining steps in the app ins	tall guide to complete deployment.	Uninstall View Components Manage L	icenses View Dependencies	)	
Package Name	SDrive			Version Number	1.22
Language	English			First Installed Version Number	1.22
Version Name	1.22			Package Type	Managed
Namespace Prefix	cg			Allowed Licenses	Unlimited
Publisher	CyanGate			Used Licenses	0
Status	Active			API Access	Unrestricted [Enable Restrictions]
Expiration Date	Does not Expire			Modified By	John Resig, 12/24/2013 1:43 AM
Description	SDrive project managed package				
Installed By	John Resig, 12/24/2013 1:43 AM				

Figure 10

If you see "Processing" screen, you need to wait for the notification email for a few minutes and once you get the email S-Drive is installed successfully (Figure 11).

Processing Your request is in progress. You will be notified by email when it completes.	Your request to install package "SDrive 1.16" was successful. Organization: User: Package: Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization. Thank You, salesforce.com
---	--

Figure 11



# B. Displaying "S-Drive" and "S-Drive Configuration" Tabs

 To display "S-Drive" and "S-Drive Configuration" tabs in your custom app (e.g. "Sales" app), go to "Setup -> Personal Setup -> My Personal Information -> Change My Display". Click "Customize My Tabs" button (Figure 12).

Personal Setup	Change My Display
My Personal Information Personal Information	Use the options below to customize your personal display of various pages.
Change My Password Reset My Security Token My Groups Change My Display	Customize My Tabs Configure the tabs to your needs. Customize My Tabs
Grant Login Access Calendar Sharing	Customize My Pages
Reminders	Select a page for a specific tab to configure that page. Home Customize My Pages
⊕ Email	
Import	
Deskton Integration	



Select your custom app from the "Custom App" drop down menu (e.g. "Sales" app). Move "S-Drive" and "S-Drive Configuration" tabs from "Available Tabs" box to "Selected Tabs" box by selecting and clicking the right arrow as shown below. Click "Save" (Figure 13).

Custom App:	1	
Available Tabs	Selected Tabs	
Account Files Answers Case Files Console Customizable Forecasts Dashboards Documents File Activities Files Groups Ideas	Add Add Accounts Cases Contacts Opportunities Remove S-Drive S-Drive S-Drive S-Drive Configuration	Up Down
	Save	

Figure 13



# C. Activating S-Drive

- After completing installation and S-Drive tab configuration, click on the "S-Drive" tab. If Remote Site Settings are configured correctly (see Figure 6), you'll see "Your remote site settings are configured correctly" message under the "Step 1: Configure Remote Sites" section (Figure 14).
- 2. As a new security feature "Step 2: Retrieve Authorization" section is added with S-Drive 1.23. If you see "S-Drive is authorized correctly." message under the "Step 2: Retrieve Authorization" section (Figure 14) you can continue with the activation. If you see an error message in Step 1 or Step 2, resolve the issue by following the on-screen instructions (Figure 15). You can't activate S-Drive without completing Step 1 and Step 2 successfully.

Welcome to S-Drive	
	Thank you for installing S-Drive.
S:\	In order to subscribe to the service you'll need to provide your payment information.
	We have partnered with Amazon Payments to handle billing information.
Step 1: Configure Re	mote Sites
Your remote site settings a	are configured correctly.
Step 2: Retrieve Auth	norization
S-Drive is authorized corre	xctiy.
Step 3: Activate Your	Product
	ve you need to activate it by providing your payment information. razon to provide easy and secure payment process.
	nents to register for Amazon Payments or use your existing account to get an activation key.
After clicking on the link you Important Note: If you alre	will be asked for Amazon credentials and provide your payment information. During the process, if asked, please also provide your Salesforce credentials, ady have an activation key, you can simply enter it in the below text box in order to activate your product. will expire in a hour therefore, the key must be used on this page as soon as it is generated or you need to regenerate the activation key.
	Pay easily with amazonpayments -
Activation	Key
	Activate Cancel

Figure 14

Welcome to S-Driv	e
S:\	Thank you for installing S-Drive. In order to subscribe to the service you'll need to provide your payment information. We have partnered with Amazon Payments to handle billing information.
Step 1: Configure	Remote Sites
You haven't configured	your Remote Sites Settings.
Go to Setup -> Adminis	tration Setup > Security Controls > Remote Site Settings and add the following three remote sites:
<ul> <li>https://ls.ama</li> <li>https://s3.am</li> <li>https://sdrive</li> </ul>	
See 'Installation Guide'	for more information.
Step 2: Retrieve A	uthorization
Your S-Drive account ca	nnot be authorized at this time. Try in 5 minutes. If the problem persists please contact S-Drive Support. See <u>Installation Guide</u> for more information.
Step 3: Activate Ye	bur Product
You have to complete S	tep 1 and Step 2 to start the S-Drive activation.





- If you do not have an Amazon.com account, you can get a new account by typing your email address and selecting "I am a new user." option.
- If you already have an Amazon.com account, type in your username, select "I am a returning user, and my password is:" option and type your password.
- Then click "Sign in using our secure server" button.

	amazon payments
CyanGate LLC has teamed with Amazon Paymen	ts to make billing quick, easy, and secure.
Please sign in to buy S-Drive.	
Amazon.com Sign In	
You may sign in using your existing Amazon account or yo	u can create a new account by selecting "I am a new user."
Enter your e-mail address:	
0	I am a new user.
۲	I am a returning user, and my password is:
	Sign in using our secure server 💽
	Eorgot your password? Click here Change your name, e-mail address, or password for your Amazon account.
	Figure 16

4. You'll enter your payment details in the next screen. Then, click "**Place your order**" to complete entering your payment information (Figure 17).

	amazonpayments	
Review the information below, then di	tk "Place your order."	Place your order
Total due today Total: \$4046	Poyment Nethol: (Dage) Van. (Holeronical Parts) Exp: (Nethols:	Billing Address: Charge Ministeration Provide and the provide and the state Provide and the state of the state of the state Provide and the state of the state of the state Provide and the state of the state of the state of the state Provide and the state of the state of the state of the state Provide and the state of the state o
	Application Information	
S-Drive		
S-Drive is your file manager that is accessible from everywhere in the world quickly w	ithin Salesforce.com. S-Drive also allows users to se	end links to files to their Salesforce contacts.
S-Drive Pricing		
There are no subscription or usage-based costs for the use of this application		
Nets: 6-04xe is sold by CyanGate LLC. Amazon Peaments vill charge your credit card for any one time month and vill include any applicable usage charges.	e and recurring charges outlined in the pricing above. Until you	a cancel your subscription to 5-Drive, any recurring charges will be charged on the 1st of every
	Terms and Conditions	
By clicking the 'Place your Order' button, you indicate that you have read and agree	to the <u>biling Services Agreement</u> -	
Review the information above, then	click "Place your order."	Place your order

Figure 17

 After completing payment options, it may require you to login to your Salesforce.com account again. If required, type your credentials and login. You'll see the "Welcome to S-Drive! You have activated your product." message and S-Drive screen. Click "Close (X)" on the right-corner of the screen to close the Amazon Payments information (Figure 18).

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# **Cyan**Gate

mazannovmonto				Clos
amazon payments				-
You already have access to this product. You may access it at any time. To view or change you	ır S-Drive subscription, click <u>here</u> .			
An activation key may be required as a part of S-Drive's registra enter it where S-Drive specifies.	tion process. If required, copy the activation key di	splayed to the right and	Activation Kev: Y Expires: April 5, 2013 2:54PM GMT	
-Drive is sold by CyanGate LLC				
salesforce			Umut Dogan 👻	Help Sales •
	tunities Cases Solutions Products Reports	Dashboards Somethings S	Drive S-Drive Configuration	+
Welcome to S-Drive! You have successfully activated your product.	)			
Folders				(Search Q)
🖻 🦢 Home	Home			
	Actions T File Name A	Created Date Created	d By ID Description	File Size
	No records to display			
Co	pyright © 2000-2013 salesforce.com, inc. All rights reserved.	Privacy Statement   Security Statemer	t   <u>Terms of Use</u>   <u>508 Compliance</u>	
	5. 10			
	Figure 18			



# D. S-Drive Attachments for Accounts, Cases, Contacts and Opportunities

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Account, Case, Contact and Opportunity standard object files and override pages are bundled with the S-Drive installation. If you'll use S-Drive attachments for these standard objects as *override*, you can use bundled objects and/or pages where appropriate. If you are planning to use S-Drive Attachments for other standard/custom objects or as *override/inline* please refer to the "*S-Drive Advanced Configuration Guide*" document.

"Overriding the view of the object" means that the page will be used as an override to the standard object page. In this case, 'S-Drive Attachments' will be a section at the end of the standard page layout.

 Go to Setup -> App Setup -> Customize -> Accounts (or Cases or Contacts or Opportunities the label of the object that you want to enable S-Drive Attachments for) -> Buttons, Links, and Actions. Click the Edit action next to the View label (Figure 19).

Buttons, Links, and Actions New Action New Button or Link Default Custom Links				n Links	
Action	Label	Name	Description	Туре	
Edit	Accounts Tab	Tab			
Edit   Del	Billing	Billing		Detail Page Link	
Edit	Delete	Delete			
Edit	Edit	Edit			
Edit	List	List			
Edit	New	New			
Edit	View 🗡	View			
	view -	VIEW			

Figure 19

 Then select Visualforce Page for Override With section and pick related Visualforce page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for Contacts, OpportunityFilePage for Opportunities) from the drop-down box. Click Save button to complete the override (Figure 20).







3. Now it will display View as Overridden in the Buttons, Links, and Actions section (Figure 21).

Buttons, L	inks, and Actions		New Action	New Button or Link Default Custom Link	3		Buttons, Links, and Actions Help
Action	Label	Name	Description	Туре	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard Salesforce.com Page		
Edit   Del	Billing	Billing		Detail Page Link	URL		
Edit	Delete	Delete			Standard Salesforce.com Page		
Edit	Edit	Edit			Standard Salesforce.com Page		
Edit	List	List			Standard Salesforce.com Page		
Edit	New	New			Standard Salesforce.com Page		
Edit	View	View			AccountFilePage (Visualforce Page)		



4. After creating an account object you should see "Account Files" (similar screens for Cases, Contacts and Opportunities once you configure) page block at the end of the object detail page (Figure 22). See "User Guide" for more information on how to use the buttons and functions in this page block.

Account Files	New Folder Upload File(s) Attach from S-Drive Folders Email Selected Delete Selected
No records to display	
	Figure 22



### S.N E. Upgrading S-Drive

Upgrading S-Drive can be done easily without any extra fee. You can go to <u>sdrive.cyangate.com</u>, click **"Get it Now"** button and follow on-screen instructions to upgrade S-Drive to the latest version.

We strongly suggest you to upgrade to the latest version of S-Drive to get latest features, bug fixes and improvements.

#### Upgrading 1.16 or later versions to S-Drive 1.23

Version 1.23 comes with new security features that requires authentication of the S-Drive through an Authentication Server.

1. You'll need to grant access to a new third-party web site while upgrading S-Drive when asked (Figure 23).

Appro	ve Third-Party Access	
Ø	This package may send or receives websites. Make sure you trust the are unsure?	
	Website	SSL Encrypted
	sdrivesync.cyangate.com	X
	✓ Yes, grant access to these the set of	
	Continue	el



2. Also after completing upgrade to the S-Drive 1.23, you need to open "S-Drive Configuration" tab and make sure "S-Drive Authorization Status" is "Authorized" (Figure 24).



If you see an error like below screenshot or "**Unauthorized**" message when you open the "S-Drive Configuration" tab, try again in 5 minutes or if the problem persists contact S-Drive Support (Figure 25).

eq:Failed:Unauthorized.+Unable+to+tunnel+through+proxy.+Proxy+returns+%22HTTP%2F1.0+404+Not+Found%22+Please+contact+S-Drive+Support.	irror occured
	$\label{eq:alpha} Failed: Unauthorized. + Unable + to + tunnel + through + proxy. + Proxy + returns + \% 22 HTTP\% 2F1.0 + 404 + Not + Found\% 22 + Please + contact + S-Drive + Support. \\$

Figure 25



#### Upgrading 1.15.4 or earlier versions to S-Drive 1.23

You can upgrade S-Drive 1.16 or later versions to 1.23 without need for further configuration. But to upgrade S-Drive 1.15.4 (or earlier versions) to 1.23, you need to pay attention to these notes:

 Since S-Drive 1.17, folders for the S-Drive Attachments are supported. You need to add a new field (Parent Folder Id) to your "object file" to make it working. See "Creating Custom Object Files" section's "g. Parent Folder Id" item to create this object. If you do not create this field you'll get an error message when you open the object's page (Figure 26).

Γ		÷
	▼ Test Object Files	)
	Content cannot be displayed: Configuration Error! Please add the required fields to your file object. Error Details: No such column 'Parent_Folder_Id_c' on entity 'TestObjectFile_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 If you need further help please contact S-Drive Support!	

#### Figure 26

You also need to increase your custom pages' (which you use for S-Drive Attachments features) Salesforce. com API version numbers to at least 22. To set the version number, edit the object's page (e.g. TestObjectPage). Click the "Version Settings" tab next to the "Visualforce Markup" tab and change the version number from drop-down (Figure 27).

١	Visualforce Markup	Version Settings					
	Name			Version	Nan	nespace	Туре
	Salesforce.com API		$\langle$	22.0 🗸			Salesforce.com API

Figure 27

If you don't update this version number and try to edit fields of the object you'll get below error screen (Figure 28):



Figure 28





## S:\ F. S-Drive Advanced Configuration

In S-Drive 1.23, we simplified S-Drive Installation Guide. Now, everything you need to start using S-Drive is in "S-Drive Installation Guide" and advanced topics for installation/configuration are in "S-Drive Advanced Configuration Guide".

Here is the list of topics that you can find in S-Drive Advanced Configuration Guide:

- Activating S-Drive using Activation Key
- Configuring S-Drive Attachments for All Standard/Custom Objects
- Allowing Customer Portal Users to Upload Case Files from Customer Portal
- S-Drive Configuration
- Attachment Sync
- S-Drive Reports
- Applying Sharing Rules to S-Drive Files/Folders
- Appyling Permissions to S-Drive Files/Folders through Profiles



# G. Troubleshooting Tips

S:\

- [Problem] I'm getting "Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://ls.amazonaws.com/?......" error.
   [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://ls.amazonaws.com
- [Problem] I'm getting "Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://s3.amazonaws.com/?......" error.
   [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://s3.amazonaws.com
- [Problem] My mail message contains ???? for some language-specific characters in email clients (Outlook, Thunderbird etc.).
   [Solution] Go to Setup -> Personal Setup -> My Personal Information -> Personal Information. Edit User Detail and set Email Encoding to Unicode (UTF-8).
- [Problem] Salesforce sharing is not working.
   [Solution] In version 1.23 sharing is only supported for S-Drive Folders. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.
- [Problem] Percent character (%) is replaced with an underscore character (\_) while downloading.

[Solution] This is a technical limitation.

**6.** [Problem] Some special characters (e.g. ğ, ş, ι) can't be typed into text fields on Apple Macintosh.

**[Solution]** This is a limitation related to Flash Player's Macintosh version. This issue will be addressed in later releases.

- [Problem] Special characters in file names are URL encoded for Firefox browser.
   [Solution] This is a limitation of Firefox.
- [Problem] If a sub folder is deleted parent folder's (+) sign stays there until clicked Home and refreshed.
   [Solution] You need to refresh the S-Drive tab.
- 9. [Problem] If folder has no sub folders, tree's folder icon is closed whether we click on it or not.[Solution] This is only a visual problem and it will not affect the operation of the application.



# S:\ **H. 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: <a href="http://sdrive.cyangate.com/support/">http://sdrive.cyangate.com/support/</a>
- 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/