



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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A. Installation

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



Figure 1

2. Click "Login to the AppExchange" to login using your Salesforce credentials. If you don't have a login, click "I don't have a login" to continue as a guest and apply for a free trial Salesforce account. Note that "even if you plan to install S-Drive into your sandbox, first you need to login to the AppExchange using your production credentials" (Figure 2).

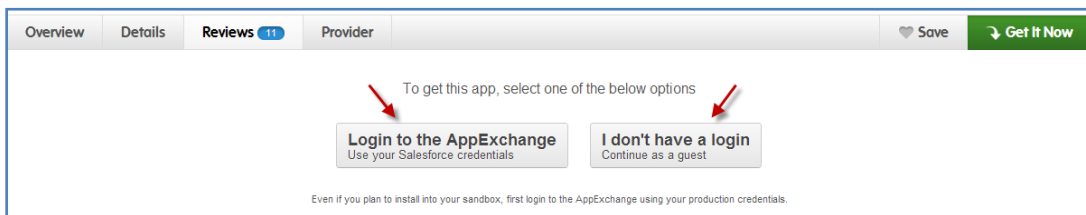


Figure 2

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).

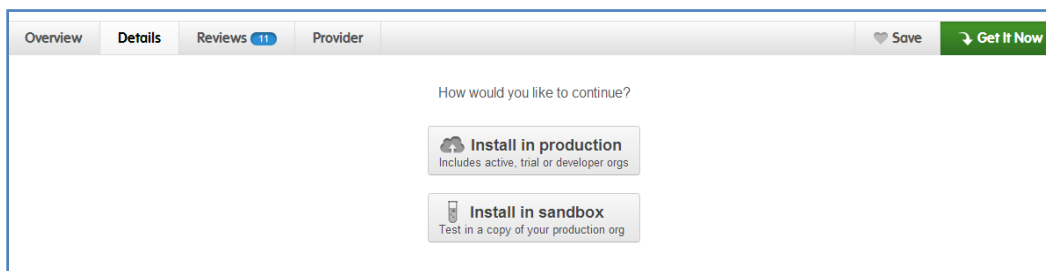


Figure 3

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).

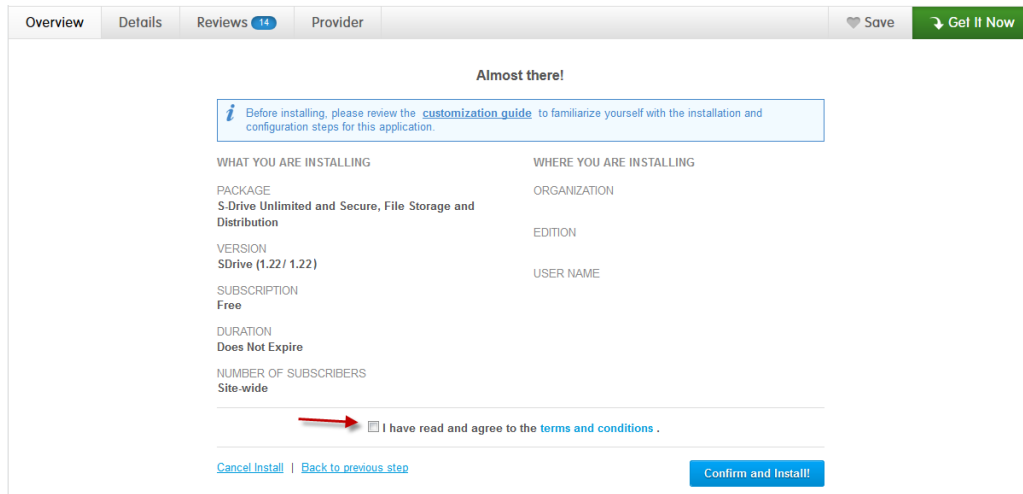


Figure 4

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).

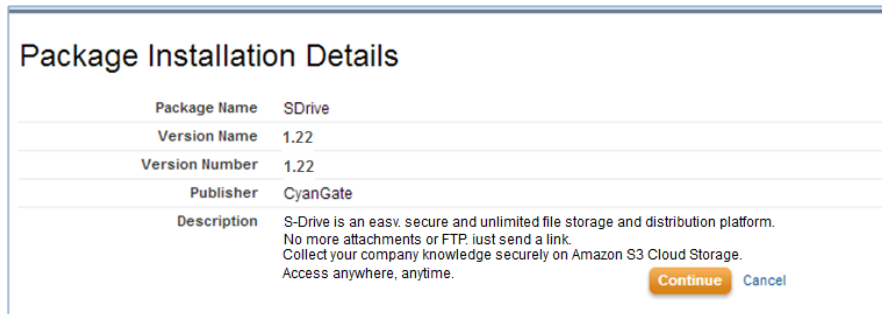


Figure 5

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

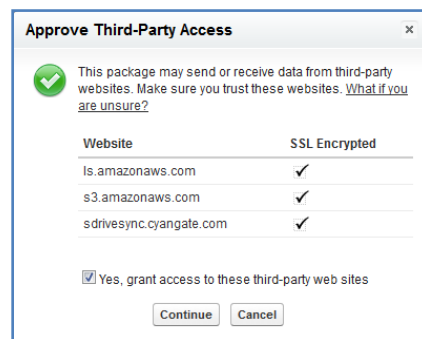


Figure 6

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

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions									
	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

Figure 7

9. 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 level Step 2 of 3

Select security settings

Admin access only Best for limited deployments. Users with your profile will have full access.

Grant access to all users All user profiles will have full access

Select security settings 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.

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.

Package Details
SDrive (Managed)
← Back to List: Installed Package

Install Complete
Follow any remaining steps in the app install guide to complete deployment.

[Uninstall](#) [View Components](#) [Manage Licenses](#) [View Dependencies](#)

Installed Package Detail		Version Number	1.22
Package Name	SDrive	First Installed Version Number	1.22
Language	English	Package Type	Managed
Version Name	1.22	Allowed Licenses	Unlimited
Namespace Prefix	cg	Used Licenses	0
Publisher	CyanGate	API Access	Unrestricted [Enable Restrictions]
Status	Active	Modified By	John Resig: 12/24/2013 1:43 AM
Expiration Date	Does not Expire		
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.

a

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

b

Figure 11

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

1. 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).

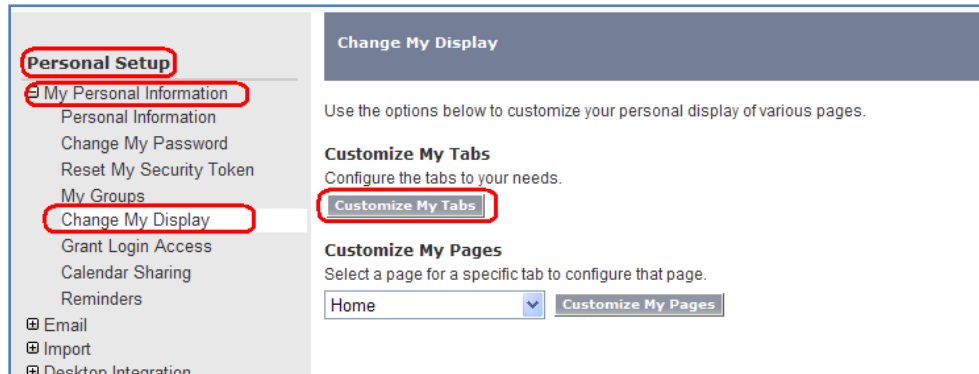


Figure 12

2. 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).

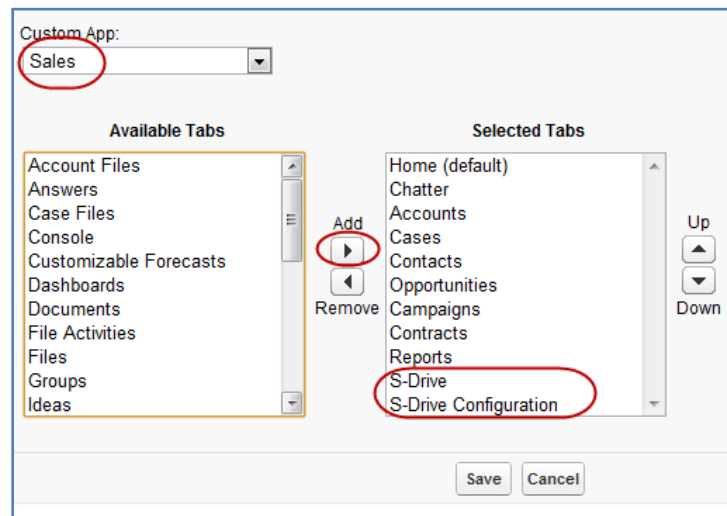


Figure 13



C. Activating S-Drive

1. 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.

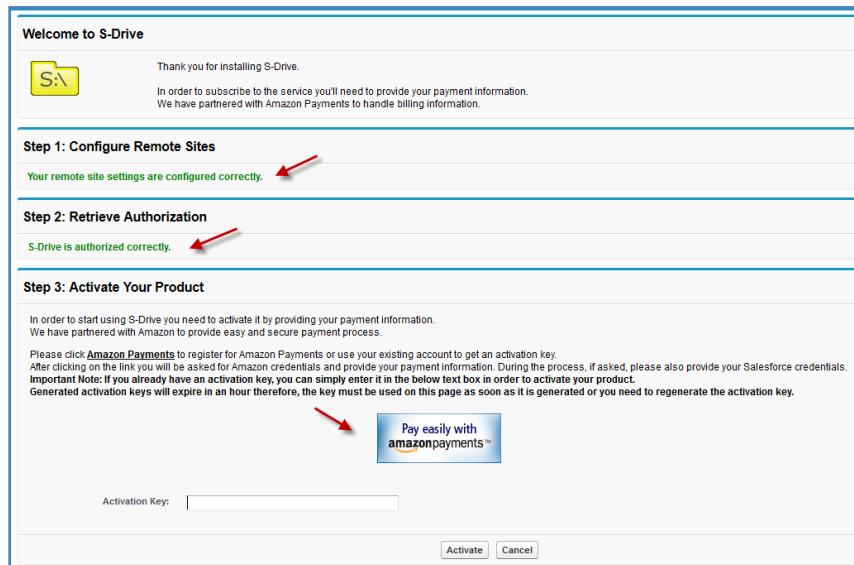


Figure 14

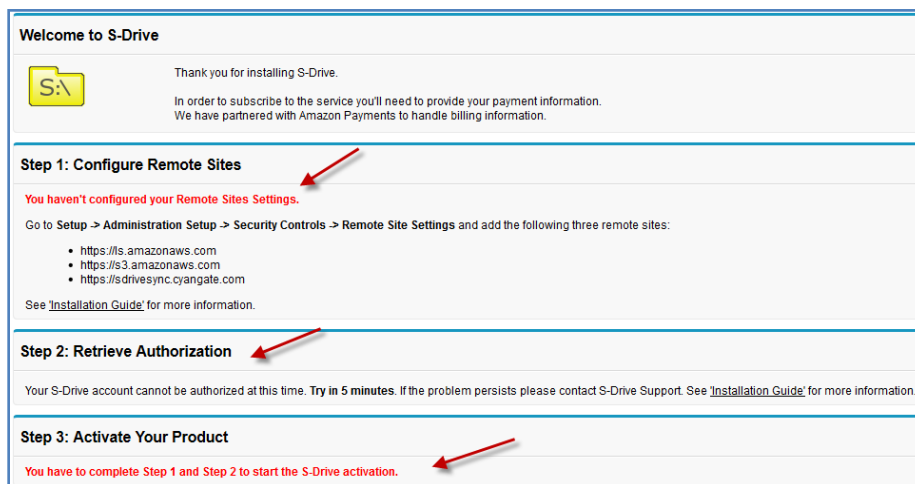


Figure 15

- Now click on the **"Pay easily with Amazon Payments"** image inside Step 3. You'll be redirected to a Amazon Payments website and it will require you to login to your Amazon.com account (Figure 16):
 - 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.

Figure 16

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

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).



amazonpayments

✓ You already have access to this product.
You may access it at any time. To view or change your S-Drive subscription, click [here](#).

An activation key may be required as a part of S-Drive's registration process. **If required, copy the activation key displayed to the right and enter it where S-Drive specifies.**

Activation Key: [REDACTED]
Expires: April 5, 2013 2:54PM GMT

S-Drive is sold by CyanGate LLC

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Umut Dogan Help Sales

Home Campaigns Leads **Accounts** Contacts Opportunities Cases Solutions Products Reports Dashboards Somethings S-Drive S-Drive Configuration +

Welcome to S-Drive! You have successfully activated your product.

Folders

Home

Actions	File Name	Created Date	Created By ID	Description	File Size
No records to display					

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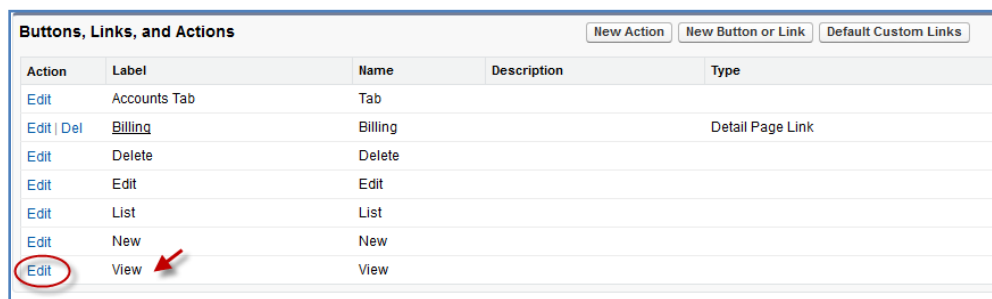
Figure 18

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

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.

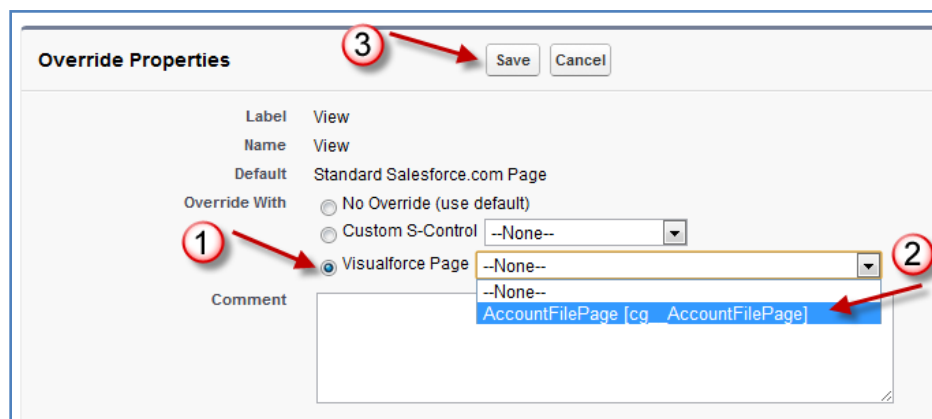
1. Go to **Setup -> App Setup -> Customize -> Accounts** (or **Cases** or **Contacts** or **Opportunities** - the label of the object that you want to enable S-Drive Attachments for) -> **Buttons, Links, and Actions**. Click the **Edit** action next to the **View** label (Figure 19).



Action	Label	Name	Description	Type
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		

Figure 19

2. 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).



Override Properties

Label: View
Name: View
Default: Standard Salesforce.com Page

Override With:

- No Override (use default)
- Custom S-Control --None--
- Visualforce Page --None--

Comment:

AccountFilePage [cg. AccountFilePage]

Save Cancel

Figure 20



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

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard Salesforce.com Page		<input type="checkbox"/>
Edit Del	Billing	Billing		Detail Page Link	URL		<input type="checkbox"/>
Edit	Delete	Delete			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	Edit	Edit			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	List	List			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	New	New			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	View	View			AccountFilePage (Visualforce Page)		<input checked="" type="checkbox"/>

Figure 21

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.

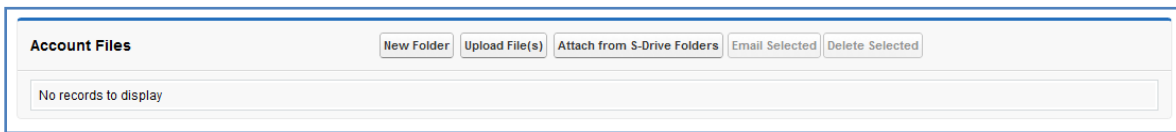


Figure 22

E. Upgrading S-Drive

Upgrading S-Drive can be done easily without any extra fee. You can go to sdrive.cyangate.com, 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).

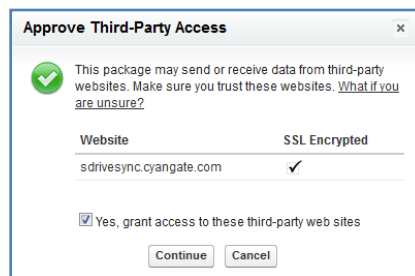


Figure 23

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).



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).

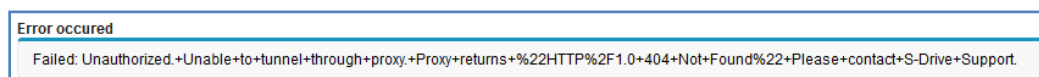


Figure 25

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:

1. 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).

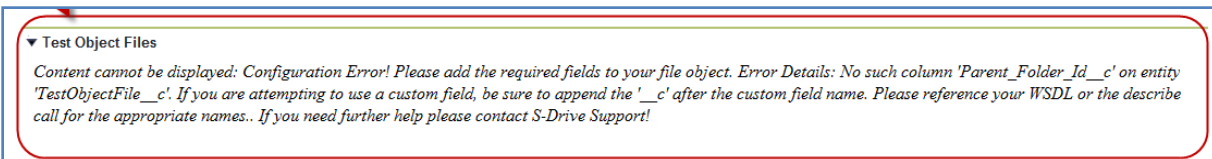


Figure 26

2. 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).

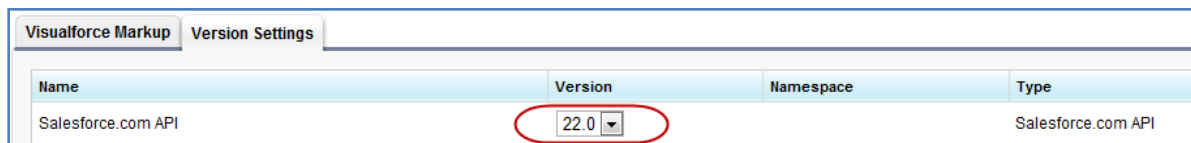


Figure 27

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

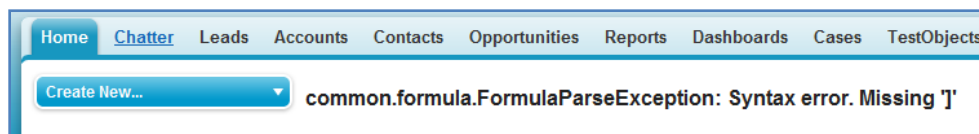


Figure 28



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
- Applying Permissions to S-Drive Files/Folders through Profiles



G. Troubleshooting Tips

- [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.
- [Problem]** Some special characters (e.g. ğ, ş, ı) 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.
- [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.



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: <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/>