



# 脑 S-Drive Quick Reference Guide v1.23

# 1. 'S-Drive Folders' Tab

'S-Drive Folders' tab has three panels: Folders panel (Figure 1-1) displays folder structure. Toolbar panel (Figure 1-2) includes buttons required for creating folders; uploading, downloading, emailing, deleting, copying, and moving files and a search box. Current Folder View / Search Results View (Figure 1-3) displays all files and subfolders inside the selected folder or based on a search accordingly. Actions column in the current folder view has file and folder basis actions like Download, Share, Rename, Edit Description, Copy URL to Clipboard, and Delete.

Folders	1	📴 🐋 🗭 🗙 🐘 📀	Search
- Company Invoices		Attions T File Name A Created Date Created By ID	Description File Size
Sales Presentations		🗄 Item Actions = 🧰 Company Invoices 4/3/2013 4:40 AM CranGate CranG	ate Company Invoices 0 bytes
		II Item Actions - A Demo PDF Documentadt (3) 4/3/2013 5:42 AM CranDate CranD	ate 149.09
		II Item Actions - III Demo TXT Document M 4/3/2013 5:42 AM CranGate CranG	ata 845 byt
		E Item Actions - Product Images 4/3/2013 4:41 AM CranGate CranG	ate Productimages Obytes
		II Item Actions - 📙 S-Drive Installation Guide 1.20.pdf 4/3/2013 5:42 All CranGate CranG	ate 831.59
		E Item Actions - Sales Presentations 432013 4.41 All CranGate CranG	ate Sales Presentations 0 bytes

## Figure 1

#### a. Creating Folders



### b. Uploading Files

Click 'Upload File(s)' button ( ) from the toolbar. Based on the configuration Java Upload Widget (Figure 3) or Flash Upload Widget (Figure 4) will be displayed as a popup or in a new page. You can switch between widgets using the "Switch to Flash Upload"/"Switch to Java Upload" links at the bottom right corner of the widget. We suggest to use Java Widget for large file uploads.

Select file(s) to upload by clicking 'Add file(s)' button ( <sup>(2)</sup>). Browse and select files by clicking 'Open' button to add files to the upload list. You can organize upload list using 'Add file(s)' ( <sup>(2)</sup>) and 'Remove file(s)' ( <sup>(2)</sup>) buttons. Click 'Upload file(s)' button ( <sup>(3)</sup>) to start uploading selected files. Upload progress will be displayed in the 'Upload Progress Bar'. Status of the uploaded file will be updated to 'COMPLETED' (Figure 4).



Figure 3



# c. Emailing Files

Select file(s) and then click 'Send Email' button ( >>) to email files. You can type a contact name into 'To' address or you can select it searching over your contacts by clicking 'Lookup' button. You can select or type 'Additional To', 'CC', and 'BCC' fields using appropriate fields and buttons. 'Attachment Expiration' is used to set the expiration time for the attached files. Default is 'Never Expires'. If you uncheck 'Never Expires', other options will appear. For example if you select 30 minutes for the attachment expiration, recipients of the email will not be able to download the attached files after 30 minutes of sending the email. You can display and hide attachment details using 'Details' buttons. You can remove individual attachments from email by clicking '-' icon next to the file name in the 'Details' section. Type your email's subject and message body or select a preconfigured template using "Select Template" button, then click 'Send' button to send the email (Figure 5). You'll get success message if mail is sent correctly. Note that you cannot email folders.







## d. Deleting Files/Folders

Select files/folders and then click 'Delete File(s)' button (×) to delete files or folders. You can delete files/folders one-by-one using 'Delete' action menu item from the Actions column of the selected file/folder. You'll be asked 'Are you sure?' after clicking 'Delete' button. Select 'Yes' option to delete files/folders (Figure 6). You cannot delete folders that contain files or subfolders.

Hotes (Company Invoices       Actions     T       Actions     T       Rem Actions     Dama PDF Document of	Actions T File Eam Actions - Actions Coy URL Gat Coy URL Gat Share Deate	Nere Delete	Yes Cancel
	Figure	6	

## e. Downloading Files

To download a single file with one click, select a file and then click 'Download' action menu item from the Actions column of the selected file. Select a folder to save the file to your computer and click 'Save' button to start downloading. Your download will be controlled by your internet browser (Figure 7). Note that you cannot download folders.

Home / Company another Actions T File Name A Memory Actions Action Actions A	Actions T File Same A mem Actions Actions A Canon DFD Documentar Composed Cargo Com- Cargo Composed File Cargo Composed File								
	Figure 7								

To download files using 'Download Manager', select files and then click 'Download File(s)' button (Figure 8-a). 'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen (Figure 8-b). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.

	Mttps://cg.nell.visuel.force.com/apex/Download/appletPage?selected/diameParis="polycity"53.
Home / Company involces	Deventions File Name Size Prograss Status Open PI Schweizer's Guida dzc 10.109 SSB Downloading Open R., PI Schweizer's Guida dzc 10.100 SSB Downloading Downloading Open R., PI Schweizer's Guida dzc 10.100 SSB Downloading
Actions T File Ilame  T File Demo PDF Document pdf	by Test Field) 34 21 tytes 300% Compile Compile
٥	Prace Presente Orecet Totar  Download Folder: C:Users/CHWORTE SOesthetsDownload Change.

Figure 8

### f. Copying and Moving Files

Select file(s) you want to copy and click 'Copy' button ( ), browse to the target folder that you want to paste the file(s), and click 'Paste' button ( ).

Select file(s) you want to move and click 'Cut' button ( $\frac{1}{4}$ ), browse to the target folder that you want to paste the file(s), and click 'Paste' button ( $\frac{1}{2}$ ).

If sharing is enabled it will ask if you want to bring the current sharings with the cut/copied item. Progress window will be displayed and files will be copied or moved to the target folder (Figure 9). Note that copy/move operations are not allowed on folders.

iome / Company Invoi	📂 🗶 🗶 👘 🏥	Pasting Demo PDF Document.pdf [1 of 1]
E Actions	T File Name A	
Item Actions -	Demo PDF Document.pdf	

## g. Renaming Files/Folders

Click the "Item Actions" menu of the file or folder you want to rename and select '*Rename*' from the list. Type in the new name in the pop-up and click '*Save*' button (Figure 10).

	Actions	т	File Name A	Rename					
5	Item Actions -	<u>ः</u> म	Company Invoices Demo.PDF.Document.pdf	File Name	Company Invoices				
	St Rename	tem	Demo TXT Document.bd			Save			
	Figure 10								

## h. Editing File/Folder Description

Click the "Item Actions" menu of file or folder you want to edit its description and select '*Edit*' from the list. Type in the new description in the pop-up and click '*Save*' button (Figure 11).

Actions T File Name A	Edit							
Item Actions - Company Invoices	Description Company Invoices							
Edt Demo PDF Document off Ref Edit Description	Save Cancel							
Figure 11								

#### i. Copying URL to Clipboard

For copying URL of a file to clipboard, click the "Item Actions" menu of the file then select '*Copy URL*' from the list. Follow the on-screen instructions and copy the URL (Figure 12). Now you can paste the URL.

	Copy URL						
🔲 🔪 Item Actions 🚽 🏓 Demo PDF Document.pdf							
Demo TXT Document bt Demo TXT Document bt	Click Select URL, then right click the highlighted text and select Copy from the menu.						
Edt Rename Copy URL to Clipboard S	https://s3.amazonaws.com/cg814885839-13110596491						
- Share I va	Select URL   Close						
Figure 12							

#### j. Sharing Files & Folders

You can list sharings on the file, add new sharings for files and folders to users/groups/roles etc, edit/delete current sharings using "Share" item menu action of the "Item Actions" menu. See "S-Drive User Guide" for detailed information.

			Tora .	Read of the second seco	Access to a second	D
		Action	Type	Name	Access Level	Heason
tome		Edit I Del	All Customer Portal Users	All Customer Portal Users	Read Only	Manual Sharing
C Actions	T File Name +	Edit   Del	All Internal Users	All Internal Users	Read Only	Manual Sharing
E hem Articont -	Company Involves		User	CranGate CranGate	Full Access	Owner
10	Section in the sec	Edit   Del	Portal Role	SalesAccount Customer Executive	Read Only	Manual Sharing
Rename	Demo PDF Document.p	Edit   Del	Portal Role	Sales Account Customer Manager	Read Only	Manual Sharing
Delate -	Demo TXT Document bt	Edit   Del	Portal Role	SalesAccount Customer User	Read Only	Manual Sharing
Edt	Share Settings		Portal Role and Subordinates	Test Account Customer User	Read Only	Custom Object Sharing R
			Public Group	Test Public Group	Read Only	Custom Object Sharing R
						New Share

Figure 13



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## k. Searching S-Drive Folders

You can search for files and folders inside S-Drive Folders (Figure 14).

To start a search, type the search criteria to the right corner of S-Drive Folders screen, into the search box and click Enter. You can use wildcards, '\* (multiple characters), ? (single character)' in search keywords. For example: *exam*\*, *boo*? etc.

Results are displayed in the same section with a 'X Result(s) Found' header. 'New Folder', 'Upload File(s)', 'Paste' buttons are invisible in the search results screen. You can go back to home by clicking 'Back to Home' link on the left of the screen.

ack to	Home 🔶	-	3 Result(s) Four	nd		
- A	ctions	T File Name A	Created Date	Created By ID	Description	File Size
	Item Actions +	Demo PDF Document.pdf	4/3/2013 9:43 AM	CranGate CyanGate		149.09 KB
	Item Actions -	Demo TXT Document.txt	4/3/2013 8:15 AM	CvanGate OvanGate		845 bytes
	Item Actions -	Demo PDF Document.pdf	4/3/2013 5:42 AM	CvanGate CvanGate		149.09 KB
	Item Actions +	Demo PDF Document off	4/3/2013 5:42 AM	CranGate CranGate		149.09

Figure 14

## I. iOS (iPad, iPhone, iPod) Support

Limited iOS (iPad, iPhone and iPod devices) support is introduced for S-Drive Folders and S-Drive Attachments (Figure 15).



Figure 15

You **can** "browse files/folders", "create folders", "search files/folders", "download files", "email files", "edit fields (e.g. Description)", "delete files/folders", "bulk delete files", "copy URLs of files", "sort files/folder ascending or descending", "attach files from S-Drive Folders (for S-Drive Attachments)" using your iOS device (preferably iPad).

But currently you **cannot** "upload files" using your iOS device. We're planning to add upload feature in next releases.

Screens for iOS devices are similar to the "S-Drive Folders" and "S-Drive Attachments" screens except the "Upload File(s)" and "Download Manager" buttons at the top of the files section are not available in iOS versions. You can refer to the "S-Drive Attachments" section of this document for more information about the usage.







## 2. 'S-Drive Attachments' Screen

'S-Drive Attachments' is the object (such as cases, accounts, etc.) attachments for S-Drive. You can create folders and upload files to objects without file size limitations using S-Drive Attachments. You can also attach files to the objects from S-Drive Folders. You can browse into the folders by using the current folder information holder and search for files and folders (Figure 16).

4000	unt Files		-	w Folder Uploa	d l'ile(s)	Attach from 5-Drive Fe	Iders Email Selected	Delete Selected	
kome								Total items: 5 (Search	<
8	Actions	т	File Name+			Created Date	Created By ID	Description	File Size
11	Item Actions +		Archive Documents			4/4/2013 6:34 AM	CvanGate CvanGate	Documents that are not used anymore	0 bytes
8	Item Actions +	J.	Demo PDF Document pdf			4/4/2013 6:36 AM	OvanGate OvanGate		149.09 8
1	Item Actions +		Demo TXT Document bd			4/4/2013 6:36 AM	CvanGate CvanGate		845 byte
11	Item Actions +	А	S-Drive Installation Guide 1	20 pdf		4/4/2013 6:36 AM	OvanGate OvanGate		831.39
8	Item Actions +		S-Drive Presentation.ppts			4/4/2013 6:36 AM	CvanGate CvanGate		1.3 MB
									Total Items

Figure 16

'S-Drive Attachments' has three sections: 'Buttons' (Figure 17), 'Navigation Panel and Search Box' (Figure 18) and 'Attachments' (Figure 19).

'Buttons' section has 'New Folder', 'Upload File(s)', 'Attach from S-Drive Folders', 'Email Selected', 'Delete Selected', and 'Download Manager' buttons (Figure 17).

New Folder Upload File(s) Attach from S-Drive Folders Email Selected Delete Selected Download Manager Figure 17

'Navigation Panel and Search Box' has navigation panel to easily browse between folders, total items/pagination for the selected object and a search box to search files and folders (Figure 18).



'Attachments' section has the list of attachments and folders. This list has 'Actions', 'File Name', and customizable field columns (default 'File Size', 'Created By', 'Created Date', and 'Description') for each file (Figure 19).

	E A	ctions	т	File Name A	Created Date	Created By ID	Description	File Size
I		Item Actions -		Archive Documents	4/4/2013 6:34 AM	CyanGate CyanGate	Documents that are not used anymore	0 bytes
		Item Actions v	А	Demo PDF Document.pdf	4/4/2013 6:36 AM	CyanGate CyanGate		149.09 KB
				Figure	19			

'Attachments' section may display the list of attachments in pages based on your configuration (Figure 20).

				New Folder	Upload File(s)	Attach from S-Drive Fold	ters Email Selected	Delete Selec	ted Down	nioad Manager	
lome	1						Tota	Items: 40 Pa	ge: 1 2	Search	Q
۲	Actions	т	File Name +			Created By ID	Created Date	Description	File Size	TestPicklist	TestText
	Item Actions +		0000			CranGate CyanGate	4/2/2013 9:42 AM		0 bytes		999
1	Item Actions -		00001			CranGate CyanGate	4/3/2013 4:35 AM		0 bytes		000
-	Hem Actions -	-	0001222			OvenCete OvenCete	4/2/2012 10:22 AM		0 hites		kikik



#### m. Creating Folders

Click '*New Folder*' button to create a folder for the selected object (Figure 17).

Once you click the button, 'New Folder' screen will be displayed. Type in the folder name and click 'Create' button to create the new folder (Figure 21).

Folder Name		
Description		
		Create Cance

You can browse between folders using the current folder information holder, above the 'Actions' column (Figure 22).

Home / Archive Documents		/								
Actions	т	File Name A								
Item Actions 🔻		Demo TXT Document.txt								
Figure 22										

## n. Uploading Attachments

Click '*Upload File(s)*' button at the top level or inside a folder to upload files. (Figure 17).

Based on the configuration Java Upload Widget (Figure 3) or Flash Upload Widget (Figure 4) will be displayed as a popup or in a new page. You can switch between widgets using the "Switch to Flash Upload"/"Switch to Java Upload" links at the bottom right corner of the widget. We suggest to use Java Widget for large file uploads.

You can follow the same steps described in '1-b. Uploading Files' section to upload files into 'S-Drive Attachments'.

## o. Attaching Files from S-Drive Folders

Click 'Attach from S-Drive Folders' button to attach files from 'S-Drive Folders' (Figure 17). This will bring the 'S-Drive Folders' screen with two additional buttons: 'Attach File(s)' and 'Cancel Attach' (Figure 23). Once the 'S-Drive Folders' screen is opened you can select files and click 'Attach File(s)' button to attach selected files to the selected object as attachments. Attaching is a copy process, so copy of the attached file will be created for the selected object.

	Home		
	Actions T File Name A	Created Date	Created By ID
	Item Actions - Company Invoices	4/3/2013 4:40 AM	CyanGate CyanGate
	Item Actions - 🔊 Demo PDF Document.pdf	4/3/2013 9:43 AM	CyanGate CyanGate
Attach	nt.bt	10/040 0-46 484	Constantin Constantin
	Attaching Demo TxT Document bit (1 of 2)	Attach complete files?	d. Do you want to attach mor
	B		C



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### p. Emailing Selected Attachments

Select one or more files using checkboxes next to each file. Click *'Email Selected'* button to email selected files (Figure 24). This will bring the 'Email Screen' described in *'1-c. Emailing Files'* section.

Account Files		New Folder Upload File(s) Attach from	n S-Drive Folders	Email Selected Delete Selec				
Home / Archive Documents	1		/					
C Actions	T File Name≜	Create	d Date	Created By ID				
Item Actions -	Demo TXT Do	cument.bt 4/4/201	13 6:50 AM	CvanGate CvanGate				
Figure 24								

## q. Deleting Selected Attachments

Select one or more files using checkboxes next to each file. Click 'Delete Selected' button to delete selected files from 'S-Drive Attachments' (Figure 25). Alternatively you can delete files one by one using the 'Delete' action menu item in the 'Actions' column of the selected file after clicking the 'Item Actions' button.

#### r. Downloading Selected Attachments

You can download a single 'S-Drive Attachment' by clicking 'Download' action menu item in the 'Actions' column of the selected file (Figure 25).

Home / Archive Documents		
Actions	т	File Name A
Item Actions -		Demo TXT Document.txt
Download		
Edit Download	d File	
Fig	gui	re 25

You can download multiple 'S-Drive Attachments' by selecting files and then clicking 'Download Manager' button. Note that you cannot download folders (Figure 26).

New Folder Upload File(s) Attach from 5-Drive Folders Email Selected Develop Moundad Ma									
Home / Documents / 5.Drive.1.16									
Ð	Attions		File liame *	Created By ID	Created Date	Description	File Size	TestPicklist	
R	Item Actions +	۲	Orange of	CvanGate CyanGate	12/17/2011 3:48 PM	test	2.58 KB		
V	Item Actions - 🔊 S-Drive Quick Reference Guide 1.15.pdf		Umut Depan	8/12/2011 4:01 AM		520.49 KB			

Figure 26

'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen (Figure 27). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.



Figure 27

## s. Copying URL of a Selected Attachment

You can copy URL of an 'S-Drive Attachment' by clicking 'Copy URL' action menu item in the 'Actions' column of the selected file.

## t. Editing Fields of a Selected Attachment

You can edit fields of an 'S-Drive Attachment' or a folder by clicking 'Edit' link in the 'Actions' column of the selected file.

#### u. Searching S-Drive Attachments

You can search for files and folders inside S-Drive Attachments (Figure 28).

To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\* (multiple characters), ? (single character)' in search keywords. For example: *exam*\*, *boo*? etc.

Results are displayed in the same section with a 'X Result(s) Found' header and some buttons are disabled in the search results screen. You can go back to home by clicking 'Back to Home' link on the left of the screen.

Account Files		New Folder Upload File(s) Atta	ch from S-Drive Folders	ail Selected Delete Selected		
Back to Home		2 Result(s	2 Result(s) Found			
C Actions	т	File Name A	Created Date	Created By ID	Description	File Size
Item Actions +	А	Demo PDF Document.pdf	4/4/2013 6:36 AM	CyanGate CyanGate		149.09 KB
Bern Actions +	A	S-Drive Installation Guide 1.20.pdf	4/4/2013 6:35 AM	CyanGate CyanGate		831.39 KB

Figure 28