



S-Drive User Guide v1.23

Important Note

This user guide contains detailed information about S-Drive usage. Refer to the *S-Drive Installation Guide* and *S-Drive Advanced Configuration Guide* for more information about installation/configuration of S-Drive product and *S-Drive Quick Reference Guide* for quick reference.



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Contents

- A. S-Drive Folders Screen 3
- B. Creating Folders 7
- C. Uploading Files 9
- D. Deleting Files 14
 - 1. Single File Deletion 14
 - 2. Multiple File Deletion 14
- E. Deleting Folders 15
- F. Emailing Files 17
- G. Downloading Files 22
 - 1. Browser Controlled One Click Download 22
 - 2. Download Manager Download 22
- H. Opening Files 25
- I. Moving Files 26
- J. Copying Files 28
- K. Renaming Files & Folders 30
- L. Editing File/Folder Description 31
- M. Copying URL to Clipboard 32
- N. Sharing Files & Folders 33
- O. Searching Items 37
- P. iOS (iPad, iPhone, iPod) Support 38
- Q. S-Drive Attachments 40
 - 1. Account Files 40
 - 2. Contact Files 46
 - 3. Opportunity Files 51
 - 4. Case Files 56
 - 5. Other Standard/Custom Object Files 62
 - 6. SDriveTools API 68
 - a. getAttachmentURL() 68
 - a. getAttachmentURLs() 70
 - b. id15to18() 71



- c. `getAccessKey()` 71
- d. `getBucketName()` 71
- e. `getUserToken()` 71
- f. `deleteFiles()`..... 71
- g. `initializeUpload()`..... 72
- g. `completeUpload()` 74
- h. `cancelUpload()` 74
- i. `getAmazonHeaders()` 75
- j. Uploading Files to S-Drive (Amazon S3)..... 76
- R. S-Drive Support 83

A. S-Drive Folders Screen

S-Drive Folders screen is mainly divided into three panels. Let's first learn more about S-Drive Folders screen:

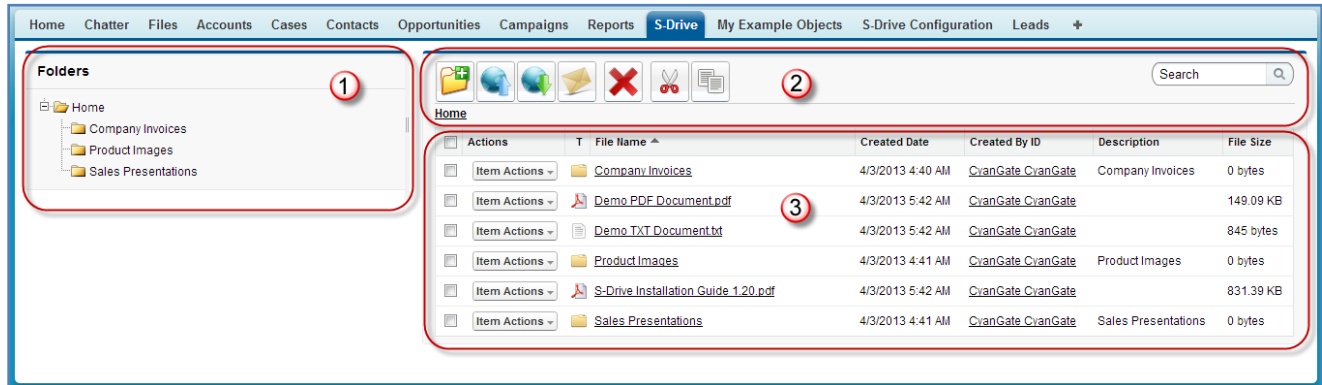


Figure 1

1. Folders

Left panel (Figure 1-1) is the **"Folders"** panel. It displays your account's folder structure. Your home folder is named as **"Home"** and your files and folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will have a plus sign (+) next to its name. After opening that folder, plus sign becomes a minus sign (-). You can open-close folders using these signs also.

2. Toolbar

Top panel (Figure 1-2) is the **"Toolbar"** panel. It displays several buttons, search box and current folder information holder. Items in the toolbar usage can be summarized as shown in Figure 3.

Important Note: If you accessed "S-Drive Folders" from "S-Drive Attachments" using "Attach from S-Drive Folders" button you'll see two buttons above the toolbar: "Attach File(s)" and "Cancel Attach". These buttons are used to attach selected files from S-Drive Folders to S-Drive Attachments of the selected object (Figure 2).



Figure 2

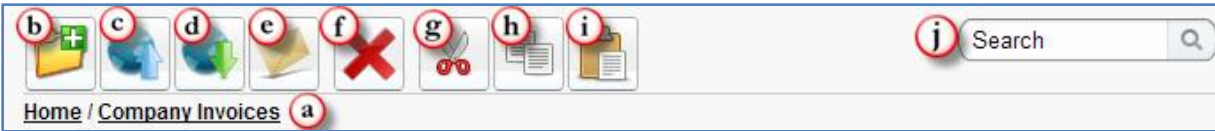


Figure 3

- (a) "**Current Folder Information Holder**" keeps the current folder information. For example if you are under "*Home/Company Invoices*" folder, the location information will be displayed in this area (Figure 3-a). You can click any level to drill down to that subfolder. Once a search is performed, search results are displayed in "Search Results View" and "Current Folder Information Holder" becomes "Back to Home" link (Figure 4). You can click to this link to go back to Home page.



Figure 4

- (b) "**Create Folder**" button is used to create folders. See "Creating Folders" section for more information (Figure 3-b). This item is not displayed for the "Search Results View".
- (c) "**Upload File(s)**" button is used to upload file(s). See "Uploading Files" section for more information (Figure 3-c). This item is not displayed for the "Search Results View".
- (d) "**Download File(s)**" button is used to open 'Download Manager'. See "Downloading Files" section for more information (Figure 3-d).
- (e) "**Send Email**" button is used to email files. See "Emailing Files" section for more information (Figure 3-e).
- (f) "**Delete File(s)**" button is used to delete file(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 3-f).
- (g) "**Cut**" button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 3-g).
- (h) "**Copy**" button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 3-h).

- (i) **"Paste"** button is used to paste the copied or cut file(s) to a folder. This button is not visible until files are selected for cut/copy. See "Moving Files" and "Copying Files" sections for more information (Figure 3-i). This item is not displayed for the "Search Results View".
- (j) **"Search Box"** is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 3-j).

3. Current Folder View / Search Results View

Right pane (Figure 1-3) is the **"Current Folder View"** by default. Files and sub-folders which belong to the current folder are listed here. If a search is performed this view is changed to **"Search Results View"** and search results are displayed inside the pane. Let's review the details of this pane (Figure 5):

1	2	3	4	5	6	7	8
Actions	File Name	Created Date	Created By ID	Description	File Size		
<input type="checkbox"/> Item Actions	Product Images	4/3/2013 4:41 AM	CyanGate CyanGate	Product Images	0 bytes		
<input type="checkbox"/> Item Actions	Sales Presentations	4/3/2013 4:41 AM	CyanGate CyanGate	Sales Presentations	0 bytes		
<input type="checkbox"/> Item Actions	Company Invoices	4/3/2013 4:40 AM	CyanGate CyanGate	Company Invoices	0 bytes		
<input type="checkbox"/> Item Actions	Demo PDF Document.pdf	4/3/2013 5:42 AM	CyanGate CyanGate		149.09 KB		
<input type="checkbox"/> Item Actions	S-Drive Installation Guide 1.20.pdf	4/3/2013 5:42 AM	CyanGate CyanGate		831.39 KB		

Figure 5

- (1) First column contains **"Select All"** and **"Select Single Item"** check box options. This column is used to select items for multiple processing (download, email, delete, cut, copy). You can select items by clicking checkboxes (Figure 5-1).
- (2) **"Actions"** column is used to display action buttons (Figure 5-2). Based on the sharing settings, you can see **"Item Actions"** button inside the Actions column. Once you click the button, you'll see a dropdown menu under the button. Let's review the details about these item actions (Figure 6):

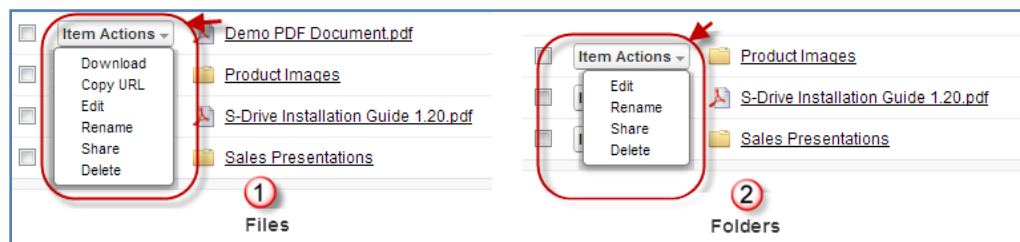


Figure 6

- (a) **Download:** This option is displayed only for files. You can download the selected file by selecting this action menu item (Figure 6-1). See "Downloading Files" section for more information.



- (b) **Copy URL:** This option is displayed only for files. You can copy the file download URL to the clipboard (Figure 6-1). See "Copying URL to Clipboard" section for more information.
 - (c) **Edit:** This option is displayed for both files and folders. You can edit file/folder description by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Editing File/Folder Description" section for more information.
 - (d) **Rename:** This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Renaming Files & Folders" section for more information.
 - (e) **Share:** This option is displayed for both files and folders. You can share file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Sharing Files & Folders" section for more information.
 - (f) **Delete:** This option is displayed for both files and folders. You can delete selected file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Deleting Files" and "Deleting Folders" sections for more information.
- (3) **"File Type Icon"** column is used to distinguish file types. Folders, text files, image files etc. have different icons. You can sort by file types by clicking the column header (Figure 5-3).
- (4) **"File Name"** column is used to display file names (including file extensions) and folder names. You can sort by file name alphabetically ascending or descending by clicking the column header (Figure 5-4).
- (5) **"Created Date"** column is used to display the file upload date. File creation date is displayed in the month/day/year hour: minute form. You can sort files by creation dates ascending or descending by clicking the column header (Figure 5-5).
- (6) **"Created By ID"** column is used to display the file creator information based on the logged in user while uploading the file. You can sort files by created by field alphabetically ascending or descending by clicking the column header (Figure 5-6).
- (7) **"Description"** column is used to display the custom description of the file/folder. This description is saved while uploading the file or creating the folder by the user. It can also be edited easily at any time. (Figure 5-7).
- (8) **"File Size"** column is used to display file size information. Folders have 0 bytes file size. You can sort filenames by file size ascending or descending by clicking the column header (Figure 5-8).

B. Creating Folders

You can create folders by clicking "Create Folder" button in the toolbar (Figure 3-b). You can create any number of sub-folders in a folder. Go to the folder that you want to create a sub-folder. Click "Create Folder" button. After clicking the "Create Folder" button, a new pop-up screen will be opened (Figure 7):

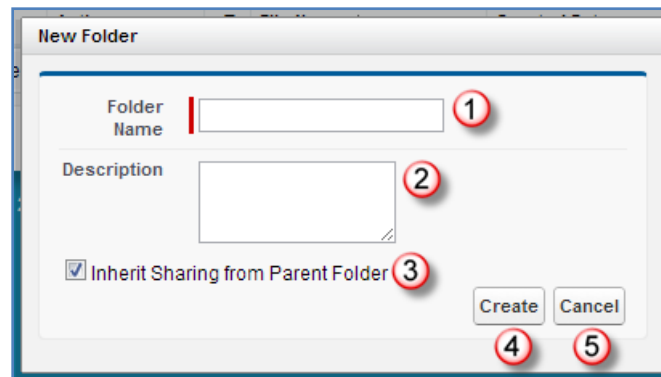


Figure 7

- (1) **"Folder Name"**: Type in the new folder name into this field. You have 255 characters limitation for the folder name. You can rename a folder after creation. Filling in this field is mandatory (Figure 7-1).
- (2) **"Description"**: Type in the folder description into this field. You can use folder description to describe the folder. This field is an optional field that means you don't have to supply a description. You have 32000 characters limitation for this field. However you should keep it short for readability (Figure 7-2).
- (3) **"Inherit Sharing from Parent Folder"**: If you're creating a folder in a subfolder and you have sharing enabled, you can inherit sharing from parent folder. Inheriting sharing from parent folder means all manual sharings that are defined on parent folder will be applied to newly created folder (Figure 7-3). You won't be able to see this option if you're creating a folder at the "Home" level or if you do not have permissions for sharing.
- (4) **"Create Button"**: After filling in the required fields, you can click OK button to create the new folder. S-Drive will create the new folder and refresh the folder structure for you (Figure 7-4).
- (5) **"Cancel Button"**: If you decide not to create a folder, you can click Cancel button. Operation will be canceled and you'll return back to the S-Drive Folders screen (Figure 7-5).



1. If you try to create a folder without a name, with forbidden characters, or with a name that exists in the current folder you'll get one of the warning messages below(Figure 8):
 - *'Name cannot be blank!'*.
 - *'Name cannot start with a space or a dot and cannot contain any of the following characters: "\ / : * ? " < > | ~"'*.
 - *'Cannot create item. An item with the name you specified already exists. Specify a different name!'*.Click OK and then specify a new name to the folder.

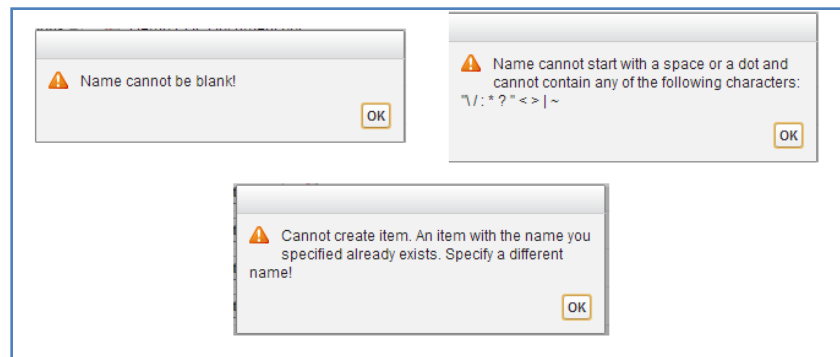


Figure 8

2. **"Create Folder"** button becomes invisible if you do not have permissions to create a folder.
3. **"Create Folder"** button becomes invisible for the **"Search Results View"** once a search operation is performed. So you cannot create a folder in the search results screen. You need to click **"Back to Home"** and go to the folder where you want to create the subfolder.

C. Uploading Files

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 3-c). You can upload any number of files into a folder at a time. Go to the folder that you want to upload files. Click "Upload File(s)" button. After clicking the "Upload File(s)" button, based on your configuration a new pop-up screen or inline upload widget will be opened as shown in Figure 9 (Flash Upload Widget) and Figure 10 (Java Upload Widget).

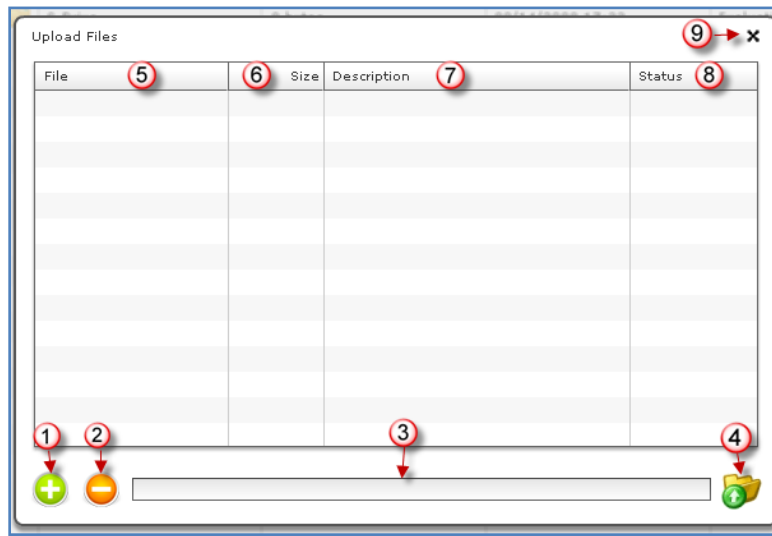


Figure 9

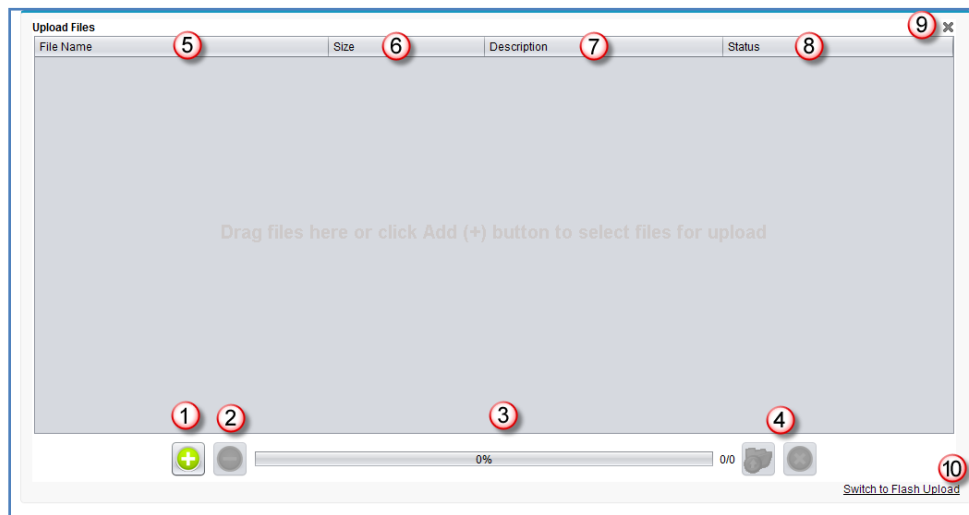


Figure 10

(1) "Add file(s) Button": You can add files to the upload list by using this button (Figure 9-1 and Figure 10-1). After clicking the (+) sign, "Select file(s)" screen will be opened (Figure 11).

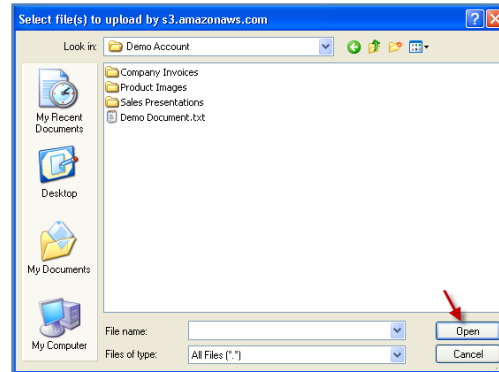


Figure 11

You can browse your computer and select files to upload. To select multiple files at a time from a folder, click on each file while you are holding "Ctrl" key. After selecting files to upload click "Open" button. Selected files will be added to the Upload Files screen. Note that selected files are not uploaded yet, you are just creating an upload list. You can use "Add file(s)" and "Remove file(s)" buttons multiple times to organize the upload list.

- (2) **"Remove file(s) Button"**: After adding some files to the "upload files list", you may decide to remove some files from the list. You can do this by selecting the file(s) from list and then clicking "Remove file(s)" button. To select multiple files, hold the "Ctrl" key, while selecting files to be deleted (Figure 9-2 and Figure 10-2).
- (3) **"Upload Progress Bar"**: This progress bar displays the upload information after clicking the "Upload file(s) Button" (Figure 9-3 and Figure 12).

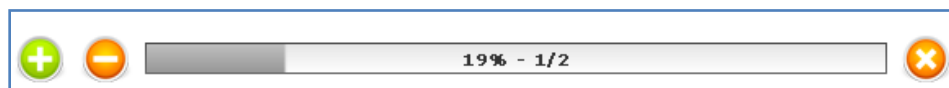


Figure 12

Percentage of the progress (i.e. 19%) and the order of the file being uploaded (i.e. 1/2) is displayed in the upload progress bar. If upload is completed successfully it displays "Upload(s) completed successfully" message inside the progress bar. You can cancel the upload at any time by clicking the "Cancel Upload button". (Note: Cancel Upload button is just visible while upload is in progress.)

For Java Upload Widget it does not display the percentage of the progress for small file uploads (5 MB, configurable), instead it displays "Uploading" message as shown in Figure 13.

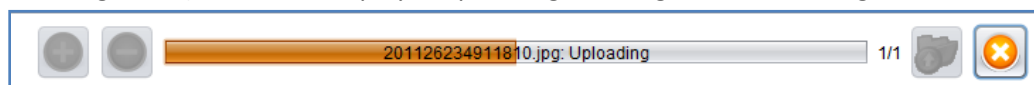
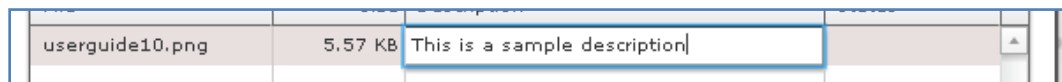


Figure 13

- (4) **"Upload file(s) Button"**: After selecting the files to be uploaded and editing their description, you can click this button, to start uploading files. "Upload file(s) Button" will change to "Cancel Upload Button" while upload is in progress. You can cancel the upload any time by clicking this button. If you cancel the upload, the current file which is being uploaded will be canceled. For example, if you select five files to upload and after uploading two files you decide to cancel the upload process, first two files will be uploaded but the process will be canceled after third file. There is also another possibility for the files that it may fail. Failing the upload for a file won't impact other file uploads, but it will be noted that it "FAILED" in the status column of the upload list after the upload completed. If you click to the "Upload file(s)" button after a failure or cancellation, "COMPLETED" files in the upload list will be skipped for this iteration and only unprocessed, failed or canceled items will be uploaded (Figure 9-4).
- (5) **"File Column"**: This column displays the names of the files to be uploaded (Figure 9-5).
- (6) **"Size Column"**: This column displays the sizes of the files to be uploaded (Figure 9-6).
- (7) **"Description Column"**: This column is used to write a description to each file to be uploaded. This is an optional field meaning that you don't have to write descriptions to files. To write a description to a file, click the cell under the Description column for that file. Type in your description and press Enter or click somewhere else in the list. Description will be saved with the file while uploading (Figure 9-7 and Figure 14).



userguide10.png	5.57 KB	This is a sample description	
-----------------	---------	------------------------------	--

Figure 14

- (8) **"Status Column"**: This column displays the status of the files which are being uploaded (Figure 9-8 and Figure 15). There are three possible scenarios: COMPLETED, CANCELED, and FAILED.

File	Size	Description	Status
userguide02.png	60.24 KB		COMPLETED
userguide01.png	14.67 KB		COMPLETED
Adobe® Flex® 3.0 For	5.65 MB		

Figure 15

- COMPLETED means, current file in the list is successfully uploaded to the S-Drive.
- FAILED means, current file failed to upload. This may happen because of a system problem or also if you select "No" for the "Overwrite file?" question.
- CANCELED means, user canceled the upload operation. Current file and the files after the current file were not uploaded to the S-Drive.

For Java Upload Widget, you can hover on the status of the individual item to display the details of a FAILED or CANCELED status.

- (9) **"Close Button"**: This button is used to close Upload Screen. It is not enabled while upload is in progress. If you want to close the upload screen while an upload is in progress, first you need to cancel the upload (Figure 9-9).



Notes

1. If you try to upload a file with a name that exists in that folder, you'll get a warning message saying "Do you want to overwrite the file?" There are three possible answers: *Yes*, *No*, and *Cancel* (Figure 16). You may get this message multiple times for multi-file uploads for each file that has the same name of a file or folder in the uploaded folder.

For Java Upload Widget, there are four possible answers: Yes, No, Yes to All, No to All.

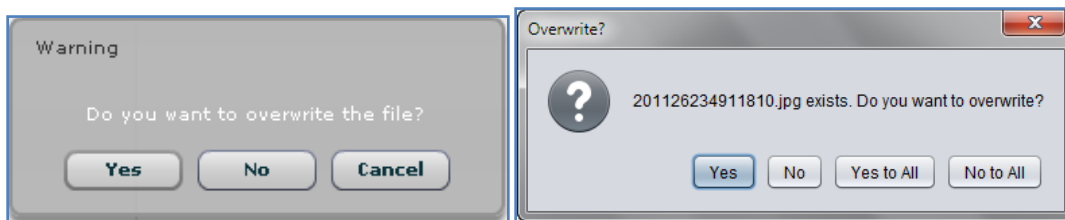


Figure 16

- If you select "Yes", file will be replaced with the uploaded file. After a successful completion its status will become COMPLETED.

- If you select "No", new file won't be uploaded. Old file will stay in S-Drive. Upload status for this file will be set to FAILED.

- If you select "Cancel", upload process will be canceled and file upload status will be set with CANCELED. If this is a multi-file upload, files after canceled file won't be processed.

2. If you try to upload a 0-byteslength (blank) file, you'll get an error saying "*You can't upload a zero-length file! (File Name)*" (Figure 17). Click OK and select another file to upload.

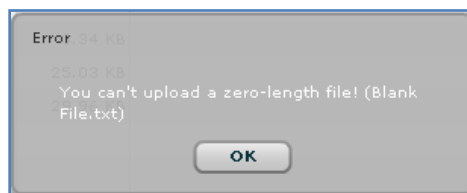


Figure 17

3. After processing the upload list, you'll be informed by saying "*Upload(s) completed successfully*" if list is processed without any errors (Figure 18). After clicking OK button, upload screen will be closed and the current folder will be refreshed.

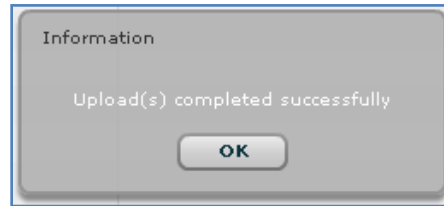


Figure 18

4. "**Upload File(s)**" button becomes invisible if you do not have permissions to upload file(s).
5. "**Upload File(s)**" button becomes invisible for the "**Search Results View**" once a search operation is performed. So you cannot upload file(s) to the search results screen. You need to click "**Back to Home**" and go to the folder where you want to upload file(s).
6. Java Upload Widget currently does not support custom object fields (only standard fields like File Name, File Size, Description, Created By, Created Date). So, you need to edit these field values after uploading files.

D. Deleting Files

There are two possible ways to delete files: "Single File Deletion" or "Multiple File Deletion". Note that "Deleting Folders" will be handled in a different topic.

1. Single File Deletion

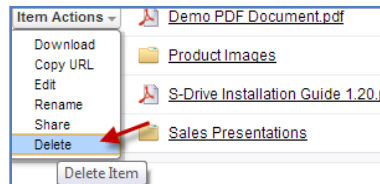


Figure 19

To delete a file, click the "Item Actions" button in the "Actions" column of the selected file and select "Delete" item menu action from the dropdown menu (Figure 19). Using this method you can delete files one by one. After clicking the "Delete File" item action menu you'll be asked if you are sure (Figure 20).

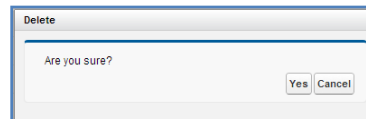


Figure 20

If you select "Yes", file will be deleted immediately and you'll return back to the S-Drive Folders screen. If you select "Cancel", file won't be deleted and you'll return back to the S-Drive Folders screen.

2. Multiple File Deletion

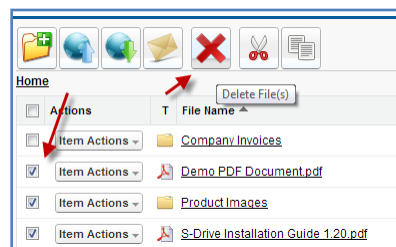


Figure 21

To delete multiple files at a time, select files and then click the "Delete File(s)" button in the toolbar of the S-Drive application (Figure 21). Using this method you can delete multiple files at a time. After clicking the "Delete File(s)" button you'll be asked if you are sure (Figure 20). Select "Yes" to delete selected files, "Cancel" to cancel delete operation.

E. Deleting Folders

You can delete folders using the same approach mentioned in the “Deleting Files” section. However there are some limitations for the folders. Because of these limitations we're discussing folder deletion in a separate topic. Here is a list of these limitations:

- You cannot delete a folder which contains files.
- You cannot delete a folder which contains sub-folders.
- You cannot delete a folder which contains a WIP (work in progress) file that is uploaded by another user in last 12 hours. This can happen in shared folders, if some other user is trying to upload a file while you're trying to delete the parent folder. Note that you won't be able to see these files. You'll only get the warning message in these cases.

If you try to delete a folder which contains items in it; you'll get *"You cannot delete this file at this time: There are sub files in one or more of the selected folders, please delete the sub files first before deleting the folders!"* warning message (Figure 22). You need to first delete items under this folder, and then you can delete that folder. Besides that delete operation can be applied same as written in “Deleting Files” section.

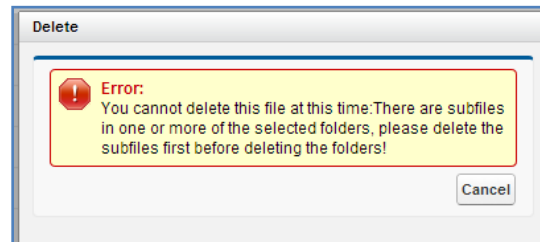


Figure 22

Also if you pay attention to these rules, you can delete files and folders together.



1. If you click toolbar's "Delete File(s)" button without selecting any file, you'll get a warning message saying *"Please select file(s) for deletion"* (Figure 23).

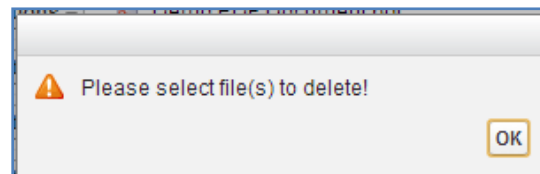


Figure 23

2. If you try to delete another user's file or folder you may get an error message: "You don't have enough permission to delete this file!" (Figure 24) that means there are sharing restrictions over files set by your System Administrator or the file owner. You need to obey the restrictions set by your System Administrator (or file owner). You need to contact with your System Administrator or file owner to correct any sharing related problem.

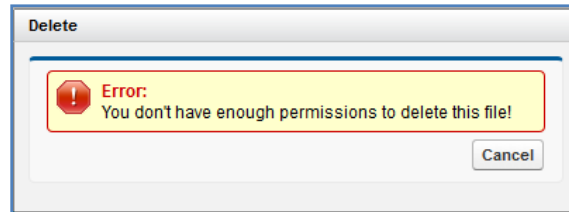


Figure 24

F. Emailing Files

Emailing files is very easy using S-Drive. You can email any number of files at a time. S-Drive does not attach files to emails; it adds links to the files at the bottom of the email message. You can set the expiration time for these links also. So, you and your email recipients don't have to wait for sending/downloading large attachments. They'll just click the link in the email and they'll download attachments directly from source in a secure and fast way. You can use email templates in your organization. Let's see how this can be done (Figure 25). First select the files to email from the folder you want by clicking checkboxes next to each file, then click "Email" button in the toolbar. Email screen will be opened (as a popup for S-Drive Folders, as a new page for S-Drive Attachments).

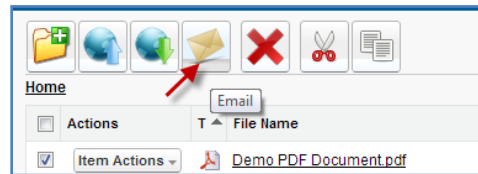


Figure 25

Email Files screen contains many features (Figure 26). Let's review the details of the fields in this screen:

The 'Email' dialog box contains the following fields and buttons:

- 11**: Send button
- 12**: Select Template button
- 13**: Close button
- 1**: Email Format: Text-Only [Switch to HTML]
- 2**: To: [Text input field]
- 3**: Additional To: [Text input field]
- 4**: CC: [Text input field]
- 5**: BCC: [Text input field]
- 8**: Subject: [Text input field]
- 9**: Body: [Text area]
- 6**: Attachment Expiration: Never Expires
- 7**: 4 attachment(s) [Details]
- 10**: Use Email Signature
- 14**: [Magnifying glass icon]

Buttons at the bottom: Send, Select Template, Close

Figure 26

- (1) **"Email Format"**: Used to select the email format. If you want to remove any HTML formatting and send a text email, click *"Switch to Text-Only"*. Click *"Switch to HTML"* to use HTML formatting or to track the email. This option will not be displayed if you selected an HTML template from the "Select Template" menu (Figure 26-1).
- (2) **"To..."**: The main recipient of the email (Figure 26-2). This field has to be filled with a Salesforce contact. You cannot type in the email address; you need to search for contacts by clicking the "Lookup" button (Figure 26-14) and then getting a user from the list. You can also type in some characters of the contact name and then click the lookup button. After clicking the "Lookup" button "Search Contacts" screen will be opened (Figure 27). If you decide to change or remove the "To..." recipient of the email you can clear this field. "Lookup" button is not available for Customer Portal users.

This field is used just for sending email to Salesforce contacts. Other recipients can be added to "Additional To...", "CC..." and "BCC..." fields. Also note that the email message is added to the Activity History of the Salesforce.com contact. You can access activity history of a contact from his contact page under Salesforce.com Contacts tab. See *S-Drive Advanced Configuration Guide* for enabling Activity History for standard and custom objects.

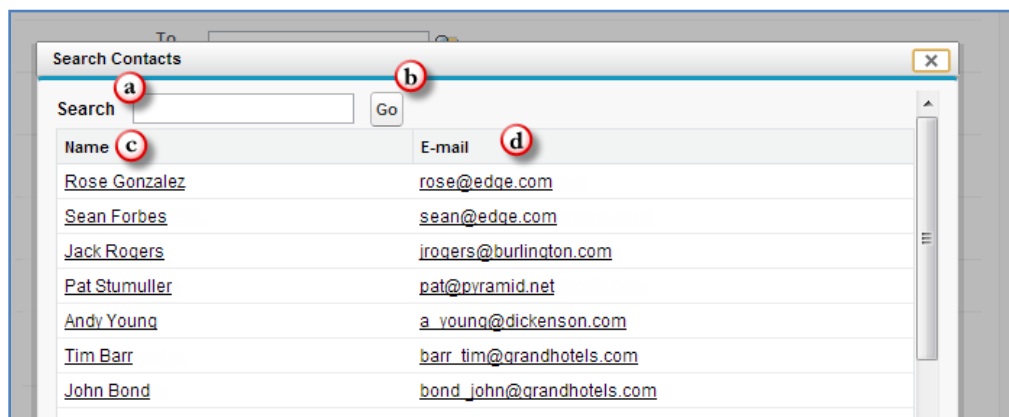


Figure 27

Important Note: For Contact, Account, Case and Opportunity S-Drive Attachments, "To" field is auto-filled with related contact information, if available. You can configure this option for custom objects using "S-Drive Advanced Configuration Guide – Creating Custom Object Files" section.

- (a) **"Search Criteria"**: Type in the search criteria in this field. S-Drive searches over name, last name and email fields for the typed keyword after clicking the "Go" button or pressing the Enter key. You can leave it blank and press "Go" button to search across all of your contacts (Figure 27-a).

- (b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 27-b).
- (c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 27-c).
- (d) **"Email Column"**: Results' emails will be displayed in this column (Figure 27-d).
- (3) **"Additional To..."**: You can add additional mail recipients here. For multiple email recipients you need to comma-separate them. Also you can click the "Lookup" button (Figure 26-14) to select recipients from Salesforce contacts (Figure 26-3). "Lookup" button is not available for Customer Portal users.
- (4) **"CC..."**: Carbon copy the email. If you want to carbon-copy the email to some recipients you can add them comma-separated here. Also you can click the "Lookup" button (Figure 26-14) to select recipients from Salesforce contacts (Figure 26-4). "Lookup" button is not available for Customer Portal users.
- (5) **"BCC..."**: Blind carbon copy the email. If you want to blind-carbon-copy the email to some recipients you can add them comma-separated here. Also you can click the "Lookup" button (Figure 26-14) to select recipients from Salesforce contacts (Figure 26-5). "Lookup" button is not available for Customer Portal users.
- (6) **"Attachment Expiration"**: This field is used to set the expiration time for the attached files (Figure 26-6). Default is "Never Expires" (but organization-wide default value can be customizable over "S-Drive Configuration", consult to your system administrator to change the default value). Means that link in the email will be active until the account is closed or the file is deleted. If you uncheck "Never Expires", other options will appear (Figure 28). If you check the "Never Expires", other options will disappear again. 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.

Attachment Expiration Never Expires 10 minute(s) minute(s) hour(s) day(s) month(s) year(s)

4 attachment(s) Details

Use Email Signature

Figure 28

- (a) **"Number Field"**: Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 28-a). For this field just positive integer values are allowed. If you type another character, you'll get "E-mail attachment expiration must use just numbers (e.g. 50)!" error message.
- (b) **"Time Type"**: You can select *minute(s)*, *hour(s)*, *day(s)*, *month(s)* or *year(s)* for this field (Figure 28-b).
- (7) **"Attachment Details"**: This section gives information about attached files (Figure 26-7). If you click "Details" button next to the "X attachment(s)" text you'll see the file names and file sizes of the attached files. You can remove attached files using red - button next to the attached file name. You can hide attachment details by clicking "Details" button again (Figure 29).

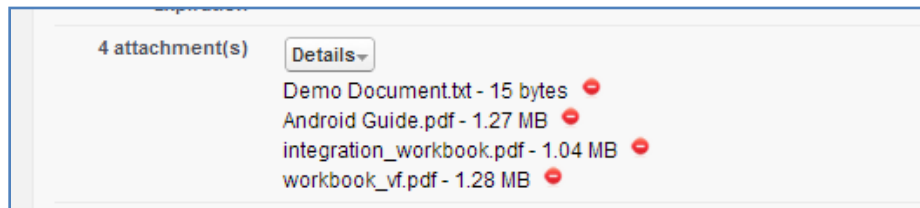


Figure 29

- (8) **"Subject"**: Type the subject of the mail to this field. This field is required. If you select a template this section is auto filled with the subject of the email template (Figure 26-8).
- (9) **"Body"**: Type the email message to this field. If you select a template this section is auto filled with the body of the email template (Figure 26-9).
- (10) **"Use Email Signature"**: If you want to use your email signature that you created over Salesforce account, check this option. If you do not want to append signature to the email, uncheck this option (Figure 26-10). "Use Email Signature" option is not available for Customer Portal users.

To display or change your email signature, login to your Salesforce account. Go to **"Setup -> Personal Setup -> Email -> My Email Settings"** and you'll see a section named **"Email Signature"**.

- (11) **"Send Button"**: To send your message, click Send button (Figure 26-11). If everything is fine you'll get "Email has been sent successfully" message. If it fails you'll get "Email Failed" message along with the reason of the failure (Figure 30).

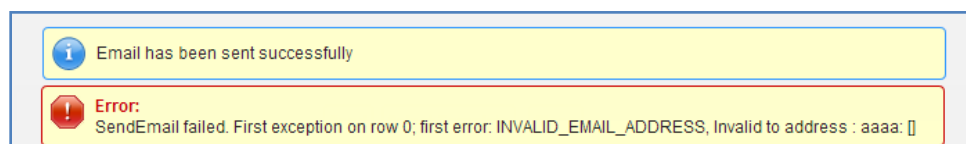


Figure 30

(12) **"Select Template"**: You can click "Select Template" button to choose a predefined email template. Choose a folder and select a template from the folder. If necessary, you can modify the content of the template in your email; however, you cannot modify Custom templates (Figure 31). Once you select the template email screens "Subject" and "Body" sections will be filled with the contents of the predefined template. Template selection screen is not available for Customer Portal users.

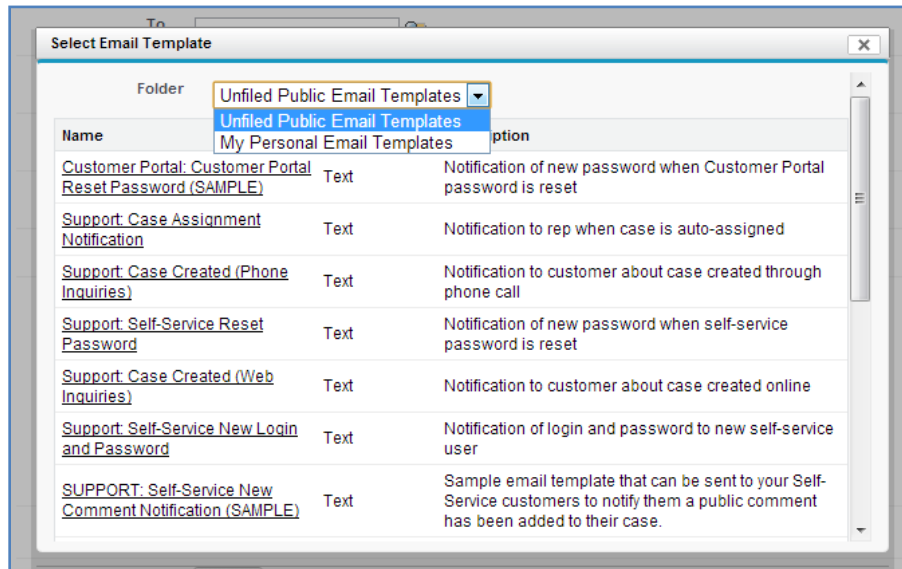


Figure 31

(13) **"Close"**: You can close email screen by clicking this button. It will close the email screen and return you back to the S-Drive screen (Figure 26-13).



1. You cannot email folders. If you try to email a folder as an attachment, you'll get "You can't email a folder. Please check your selection list and try again!" message (Figure 32).

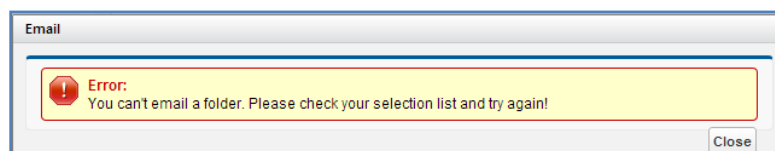


Figure 32

G. Downloading Files

There are two ways of downloading files in S-Drive: "**Browser Controlled One Click Download**" and "**Download Manager Download**". To enable "Download Manager Download" your organization's system administrator must enable it from "S-Drive Configuration" page.

1. Browser Controlled One Click Download

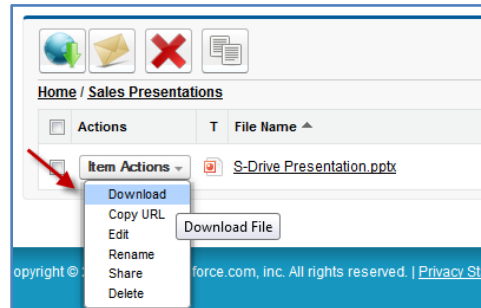


Figure 33

You can download individual files by clicking "**Download**" item menu action from the "Item Actions" button (Figure 33). "Download" item menu action is only available for files. Download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) (Figure 34).

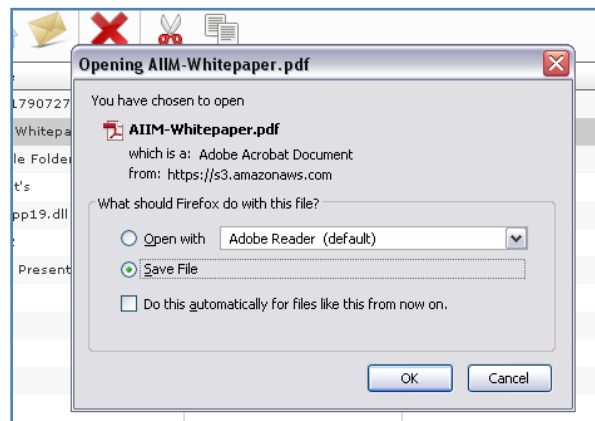


Figure 34

2. Download Manager Download

To use "Download Manager", your organization's "System Administrator" needs to enable it from "S-Drive Configuration" screen. Read "*S-Drive Advanced Configuration Guide*" for more information.

If "Download Manager" is configured in your organization, you should see the "Download File(s)" button in "S-Drive Folders" toolbar (Figure 35).

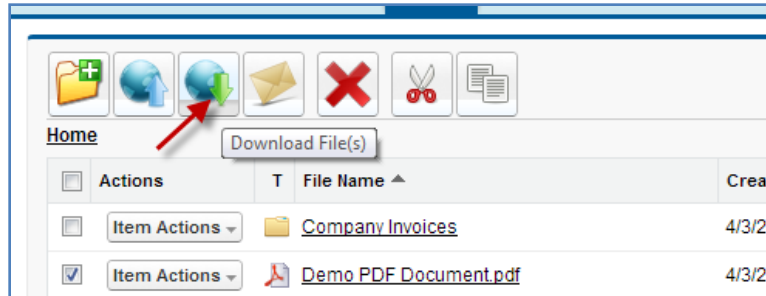


Figure 35

Select some files and click Download Manager to start the downloads. A popup screen will be opened and downloads will progress. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen. Once the download is finished you can open the downloaded file by clicking "Open" button on the right of the file. Also you can add more downloads when "Download Manager" screen is open. Newly added files will be added to the list and the new downloads will start immediately (Figure 36).

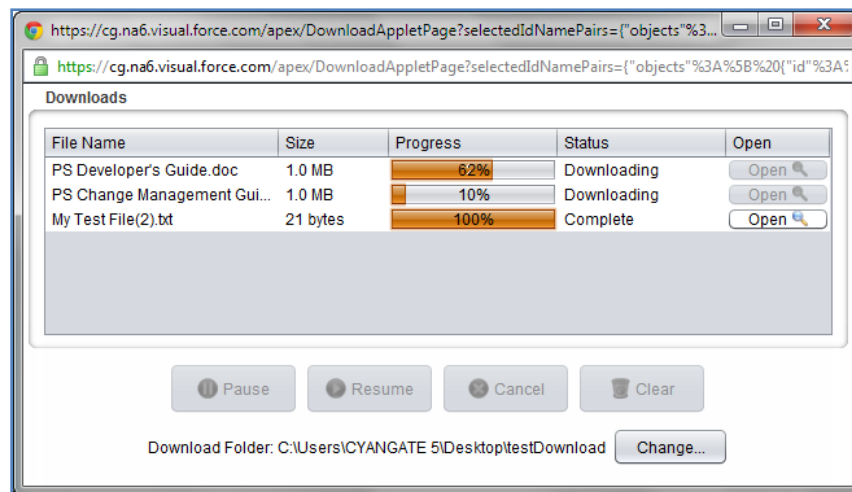


Figure 36

If you try to add a file that is currently in the download list, you'll get a warning message (Figure 37):

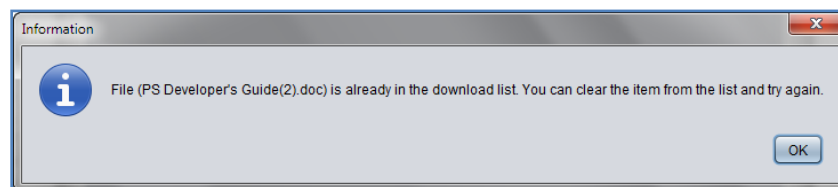


Figure 37

You cannot download folders. If you try to download a "folder", you'll get an error message (Figure 38):

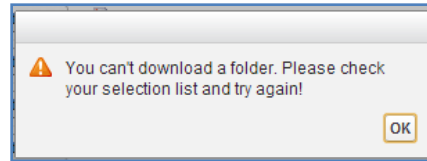


Figure 38



Notes

1. You cannot download folders. "Download" item menu action is invisible for the folders. You need to download files from folders.
2. Currently "Download Manager" **can be used for one type of object at the same time**. So if you're downloading account files, you can't download case files at the same time using "Download Manager". You need to complete account file downloads, close the "Download Manager" and open a new "Download Manager" for case files.
3. You'll not be able to download files from "S-Drive Folders" and "S-Drive Attachments" using the same "Download Manager" screen. It will open different Download Managers.
4. In "Download Manager" if there is a file with the same name in the target download folder, file will be renamed to <FILENAME> (1). <EXTENSION> or <FILENAME>(2).<EXTENSION> etc. accordingly.

H. Opening Files

If you open the files automatically, you should click “Open” link (Figure 39).

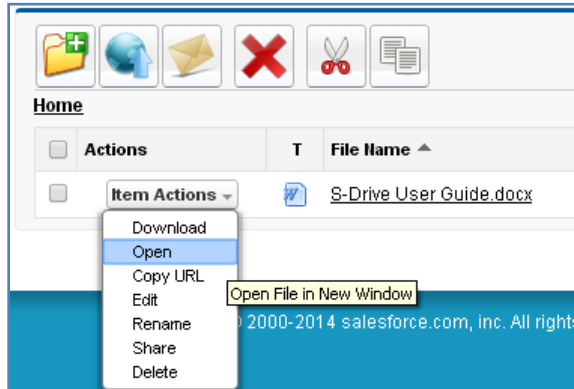


Figure 39



1. You should make some configurations for browsers (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) to enable some types of files for opening. You can reference below links:

Internet Explorer

http://247support.custhelp.com/app/answers/detail/a_id/8892/~/internet-explorer%3A-no-download-prompt-appears

http://erptraining.niu.edu/erptraining/PS_browser_settings/ie9.shtml

Chrome

<http://blog.rubbersoft.com/2010/01/how-to-automatically-open-downloaded-files-in-chrome/>
<http://www.adeptscience.co.uk/kb/article/1379E>

Firefox

<http://meruscase.com/customizing-your-experience/how-do-i-auto-open-documents-in-firefox/>
http://kb.mozillazine.org/File_types_and_download_actions

I. Moving Files

You can move files between directories in S-Drive. To do this, first you need to select files to move. Then click the **"Cut"** (✂) button at the top menu. Go to the folder where you want to paste the files, select **"Paste"** (📄) button at the top menu (Figure 40).

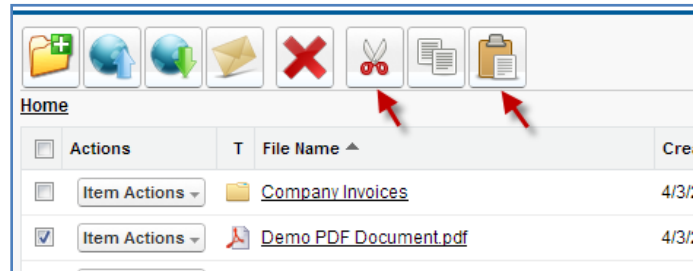


Figure 40

If sharing is enabled, it will ask if you want to bring the current sharings with the cut item(s). You can select "Yes" or "No" based on your decision (Figure 41).

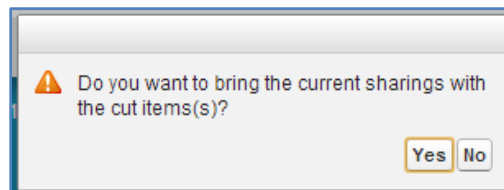


Figure 41

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 42). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.

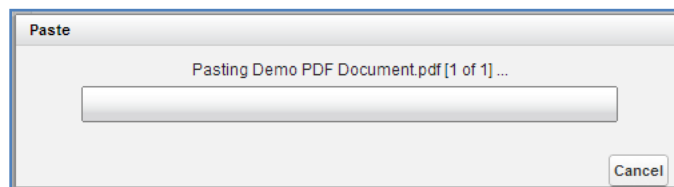


Figure 42

If there is already a file with that name inside the target directory, S-Drive will warn you with "Do you want to overwrite?" message (Figure 43).

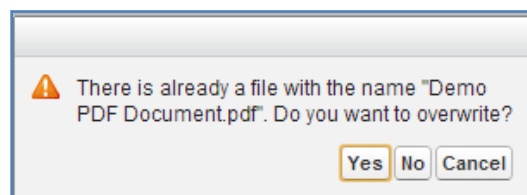


Figure 43



If you select “Yes”, it will overwrite the file and if there are other files in move list, it will process them. If you select “No”, it will skip that file and process other files in the move list. If you select “Cancel” it will cancel the move process and won’t process the files left.



2. "**Cut**" and "**Paste**" buttons become invisible if you do not have permissions to cut/paste items in the current folder.

J. Copying Files

You can copy files between directories in S-Drive. To do this, first you need to select files to copy. Then select **"Copy"** (📄) button at the top menu. Go to the folder where you want to paste the files, and select **"Paste"** (📄) button at the top menu (Figure 44).

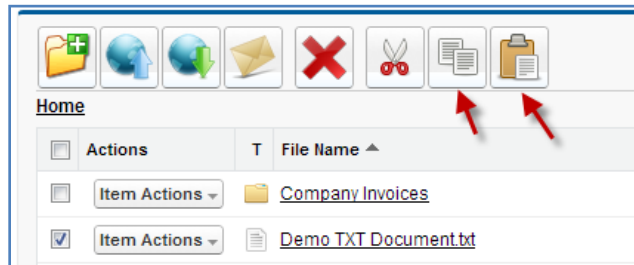


Figure 44

If sharing is enabled, it will ask if you want to bring the current sharings with the cut item(s). You can select "Yes" or "No" based on your decision (Figure 45).

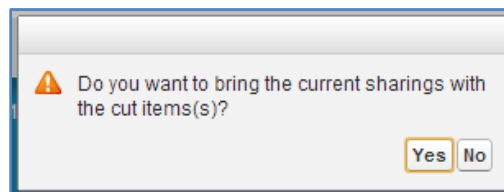


Figure 45

It will start the copy operation and a progress bar will be displayed in the middle of the screen (Figure 46). You can cancel the copy operation anytime by clicking the "Cancel" button. After completion of the copy operation this pop-up screen will disappear.

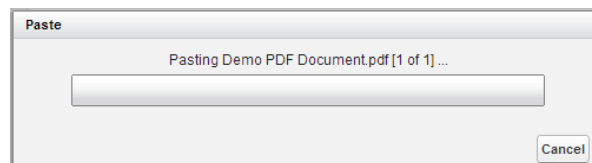


Figure 46

If there is already a file with that name inside the target directory, S-Drive will warn you with the "Do you want to overwrite?" message (Figure 47).

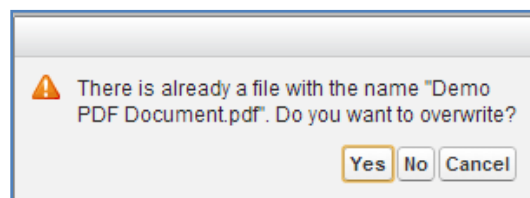


Figure 47



If you select "Yes", it will overwrite the file and if there are other files in copy list, it will process them. If you select "No", it will skip that file and process other files in the copy list. If you select "Cancel" it will cancel the copy process and won't process the files left.



1. **"Copy"** and **"Paste"** buttons become invisible if you do not have permissions to copy/paste items in the current folder.

K. Renaming Files & Folders

To rename files and folders in S-Drive you just need to select "Rename" item menu action from the "Item Actions" menu of the item that you want to rename (Figure 48-1), and type in the new name in the opening Rename screen(Figure 48-2).

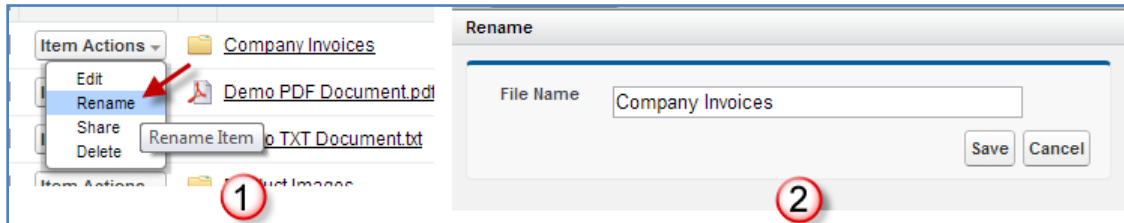


Figure 48



1. If you try to rename a file/folder that you do not have edit permissions, you'll get "You don't have enough permission to update this file!" error message (Figure 49).

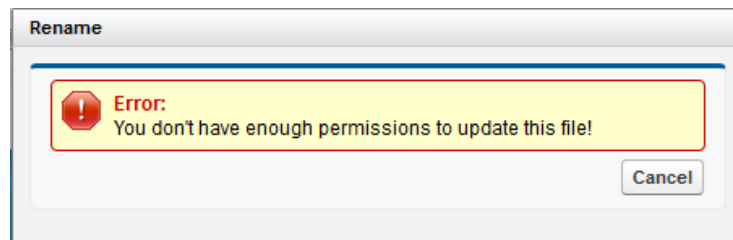


Figure 49

L. Editing File/Folder Description

To edit description of a file/folder, select a file/folder. Then go to the "Actions" tab of the selected file/folder. Click to the "Item Actions" button and select "Edit" item menu action from the dropdown list (Figure 50).

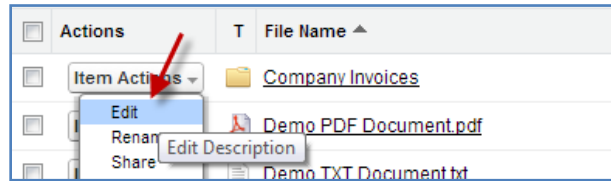


Figure 50

A new pop-up named "Edit" will be opened. You can change the description here and click "Save" button to save changes. If you click Cancel button, description won't be updated and this pop-up will be closed (Figure 51).

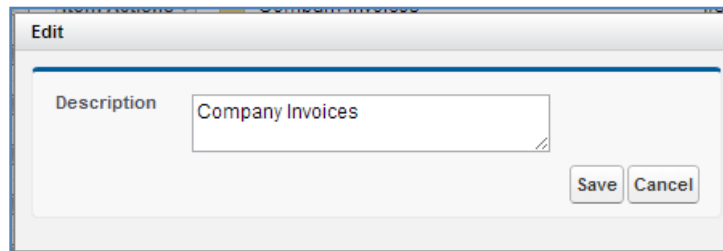


Figure 51



Notes

1. If you try to edit description of a file/folder that you do not have edit permissions, you'll get "You don't have enough permission to update this file!" error message (Figure 52).

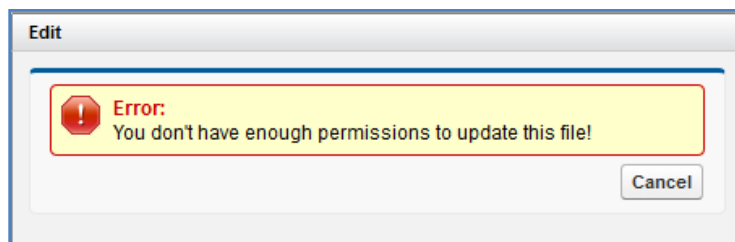


Figure 52

M. Copying URL to Clipboard

To copy URL of a file to clipboard, click "Item Actions" button next to the file and click "Copy URL" action menu item to copy the URL of the selected file to the clipboard (Figure 53).

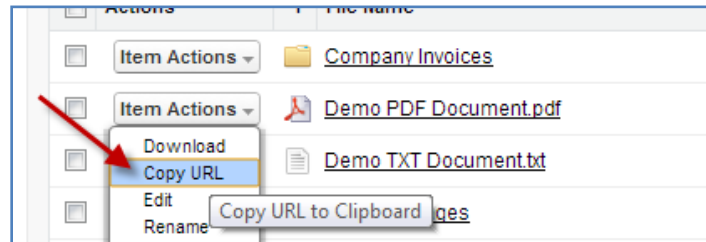


Figure 53

After clicking this button, Copy URL pop-up will be displayed (Figure 54). Select the URL by clicking "Select URL" link in this pop-up. You can close this pop-up by clicking "Close" link.

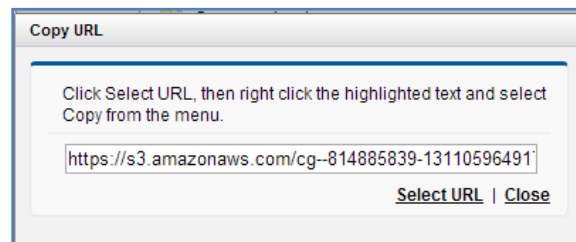


Figure 54

You can paste it to any document or you can use it to access file from browser. For example, if you paste it to the Internet Explorer address bar after copying it, you will get a direct download link for the file (Figure 55).

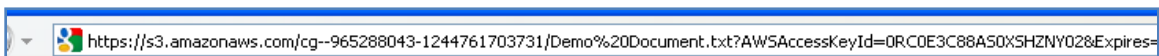


Figure 55



Notes

1. This feature is not enabled for folders. Because folders don't have URLs in S-Drive. "Copy URL" item menu action is invisible for the folders.

N. Sharing Files & Folders

With S-Drive 1.23, object level sharing is supported for S-Drive Folders. You can share files and folders by clicking "Item Actions" button under "Actions" column and selecting "Share" action menu item from dropdown for individual files and folders (Figure 56).

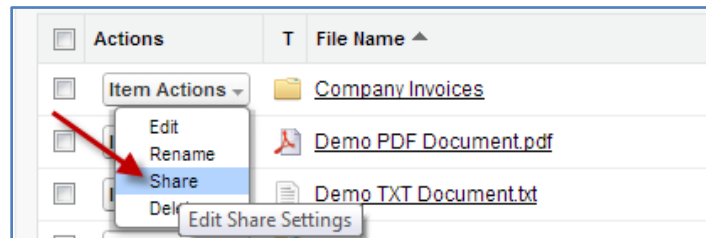


Figure 56

Once you select "Share" action menu item, current sharings on the file will be listed in a pop-up (Figure 57). You can review the shares on the object, add new shares, edit/delete manual sharings, using this screen.

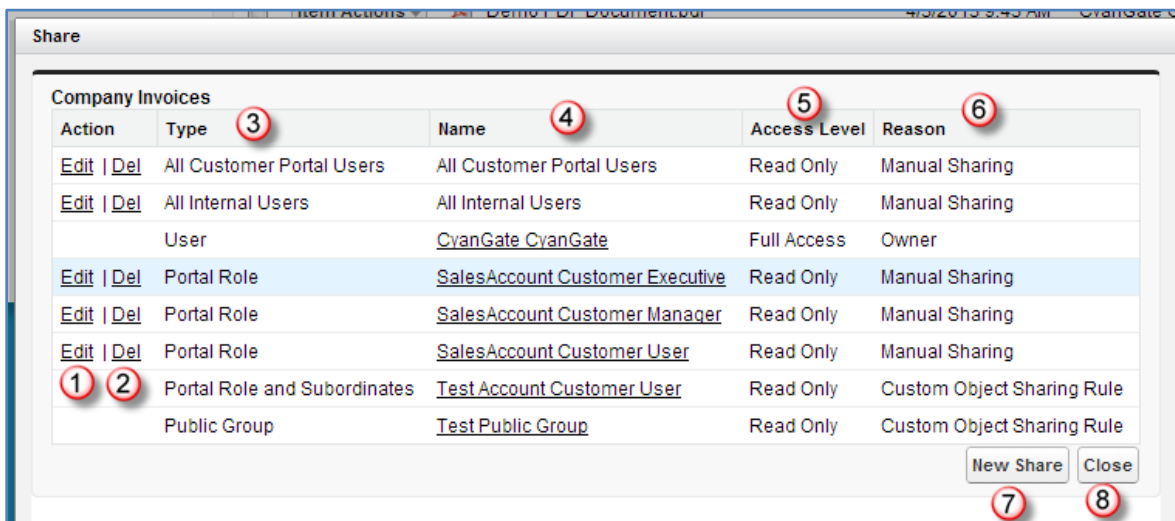


Figure 57

"Action" column is used to edit or delete the manual sharings (Figure 57-1 and Figure 57-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 57-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 57-4). If name is underlined you can click to open the details in a new window. "Access Level" column displays if the share is "read only", "read/write" (Figure 57-5). "Reason" column displays the reason of the sharing (Figure 57-6). Only manual sharings are editable, other types of sharings (owner, custom object sharing rule etc.) are for view purposes.

You can add new shares by clicking "New Share" button (Figure 57-7) and close this screen by clicking "Close" button (Figure 57-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 58). You can select the "Type" from the dropdown (Figure 58-1). Once you select the type, available fields will be listed in "Available" section (Figure 58-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 58-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 58-4). Selected shares can be saved using "Save" button, you can go back by clicking "Cancel" button and you can close the Share pop-up by clicking "Close" button (Figure 58-5).

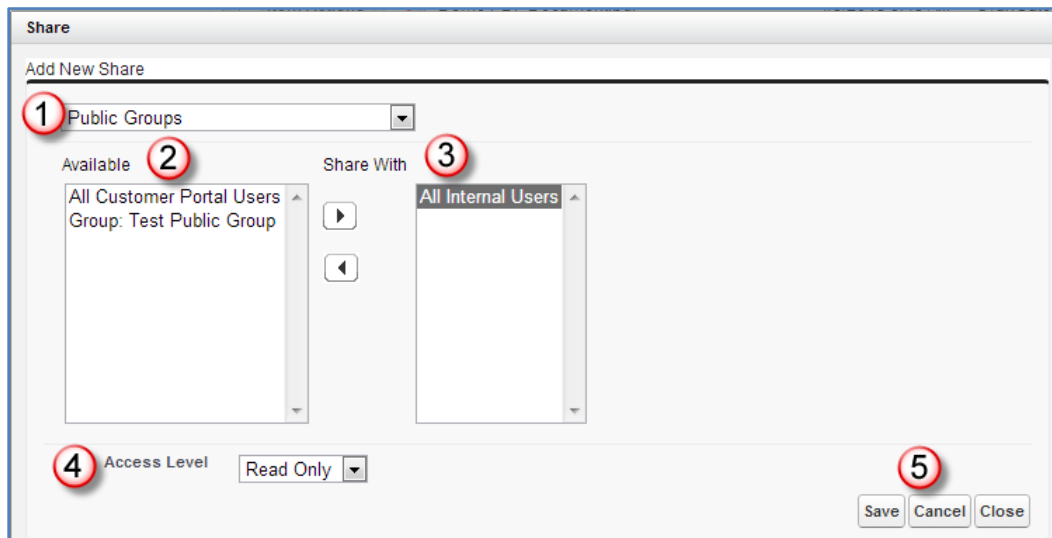


Figure 58

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 57-1). You can change selected object's access level and save (Figure 59).

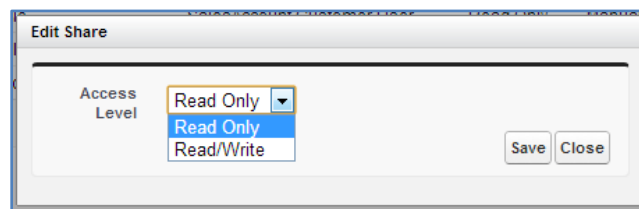


Figure 59

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 57-2). If you select "Yes", share will be deleted (Figure 60).

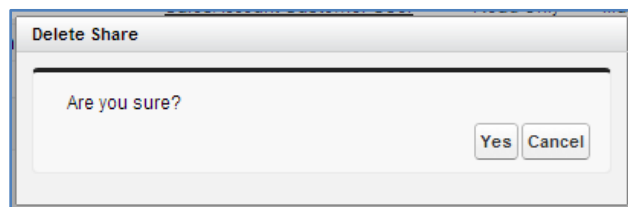


Figure 60



1. Sharing items (files or folder) with "Read Only" access level gives allowed shared user/group/profile etc. read only access. That means user can see file details, download file, copy file; but cannot edit, delete, move, rename file. If user has "Read Only" access on a folder he won't be able to see "New Folder", "Upload File(s)", "Cut" buttons.
2. Sharing items (files or folder) with "Read/Write" access level gives allowed shared user/group/profile etc. read write access. That means user can see file details, download file, copy, edit, delete, move, rename file. But cannot delete the file. Only file/folder owner can delete the file.
3. If no sharing is given to the user on a folder, user won't be able to see the folder and its contents.
4. Sharing folders affects sub files and folders. So, if you share a folder, that sharing will be applied to sub files and folders.
5. If sharing is enabled and if you're in a subfolder (not Home folder), you'll see "Inherit Sharing from Parent Folder" checkbox when creating a folder or uploading files. Default is checked. You can uncheck this checkbox if you do not want to inherit sharings from parent to the newly created folder or file (Figure 61) at the time of creation.

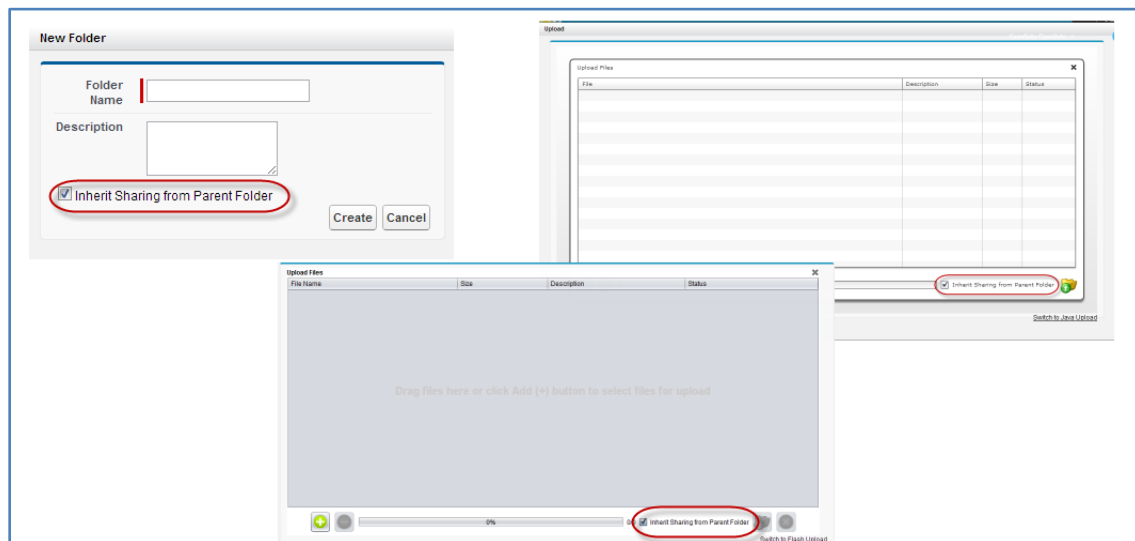


Figure 61



6. If there are profile level permission definitions, profile level permissions override the sharing settings. So if "S3Objects" is set as read only for a profile, there is no meaning to give read/write access on a folder.
7. Based on the sharings that your file/folder have, some or all of the "Item Actions" item action menus may be invisible or clicking the item in the dropdown will warn you with a "not enough permission" error message.
8. If you want to restrict standard users to create files and folders at the top level of S-Drive Folders you can check **"Only Allow Users with Modify All Permissions to Create Items at the Top Level"** checkbox from "S-Drive Configuration" tab.
9. "Share" item action menu in "Item Actions" dropdown is not visible to customer portal users.

O. Searching Items

You can search for files and folders inside S-Drive Folders. To start a search, type the search criteria to the right corner of S-Drive Folders screen, into the search box and click Enter (Figure 62).

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.

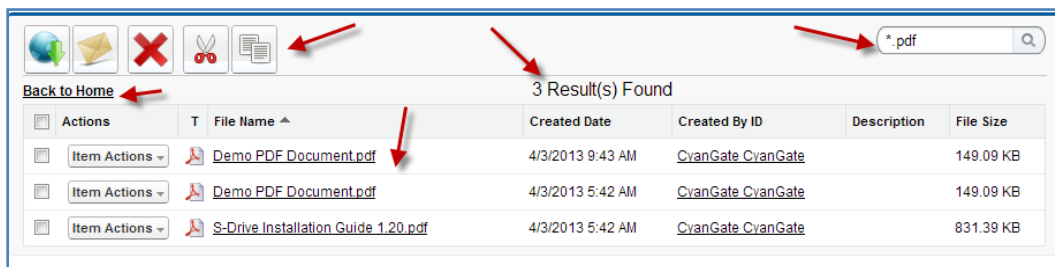


Figure 62



Notes

1. Salesforce.com does not index uploaded files immediately, so newly uploaded files will be eligible for search in a few minutes after the upload.
2. Pagination is not supported for search results. You'll see all results of a search in a single page.
3. Search is performed on searchable fields like "File Name" and "Description".
4. If you try to search with blank criteria, you'll get an error message saying: "*Search keyword cannot be empty!*" (Figure 63-1).

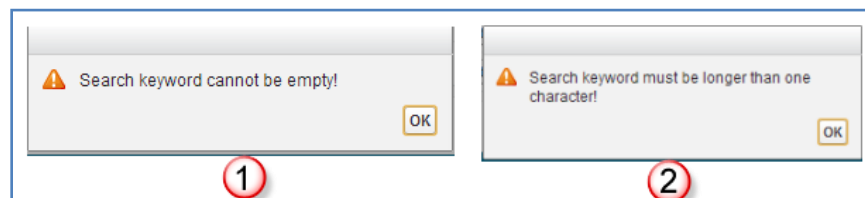


Figure 63

5. If you try to search with one character, you'll get an error message saying: "*Search keyword must be longer than one character!*" (Figure 63-2).

P. iOS (iPad, iPhone, iPod) Support

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments with S-Drive 1.23(Figure 64).



Figure 64

You can browse and search folders/files, create folders, download files, email files, cut-copy-paste files, edit fields (e.g. Description), delete files/folders, copy URLs of files, sort files/folder ascending or descending using your iOS device (preferably iPad) (Figure 65).

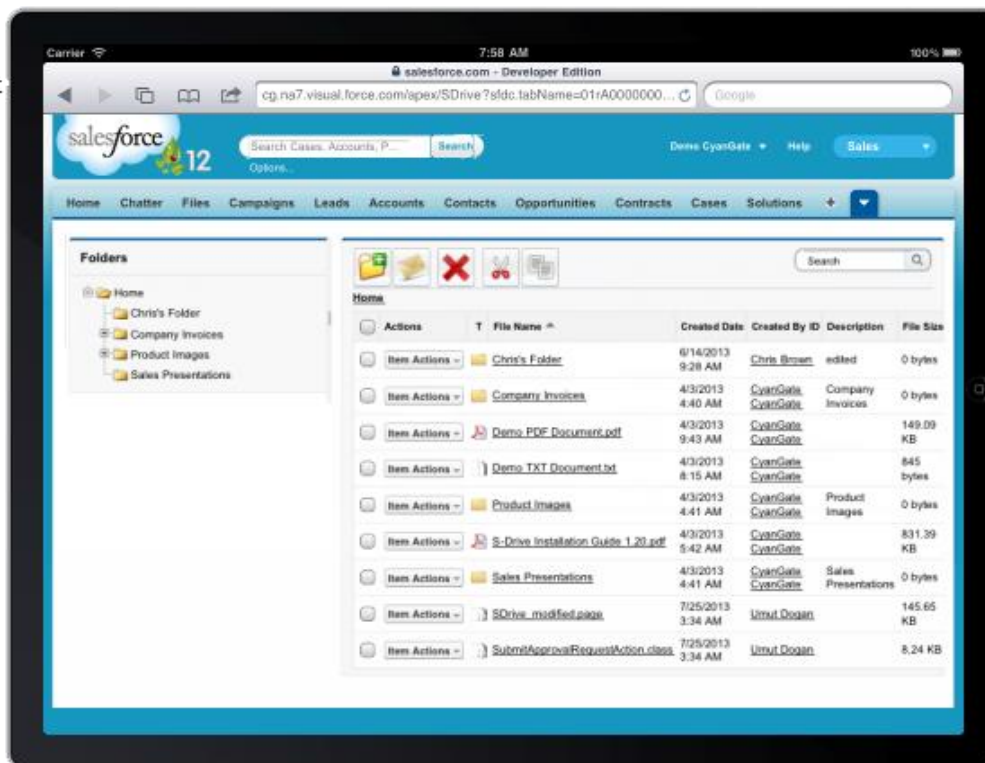


Figure 65

But currently you **cannot upload files, download files using Download Manager for bulk download** with your iOS device. Because iOS devices does not support Flash and Java technologies that our upload widgets use. 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" 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.

Below is a screenshot of the Case Files section from an iPad device (Figure 66).

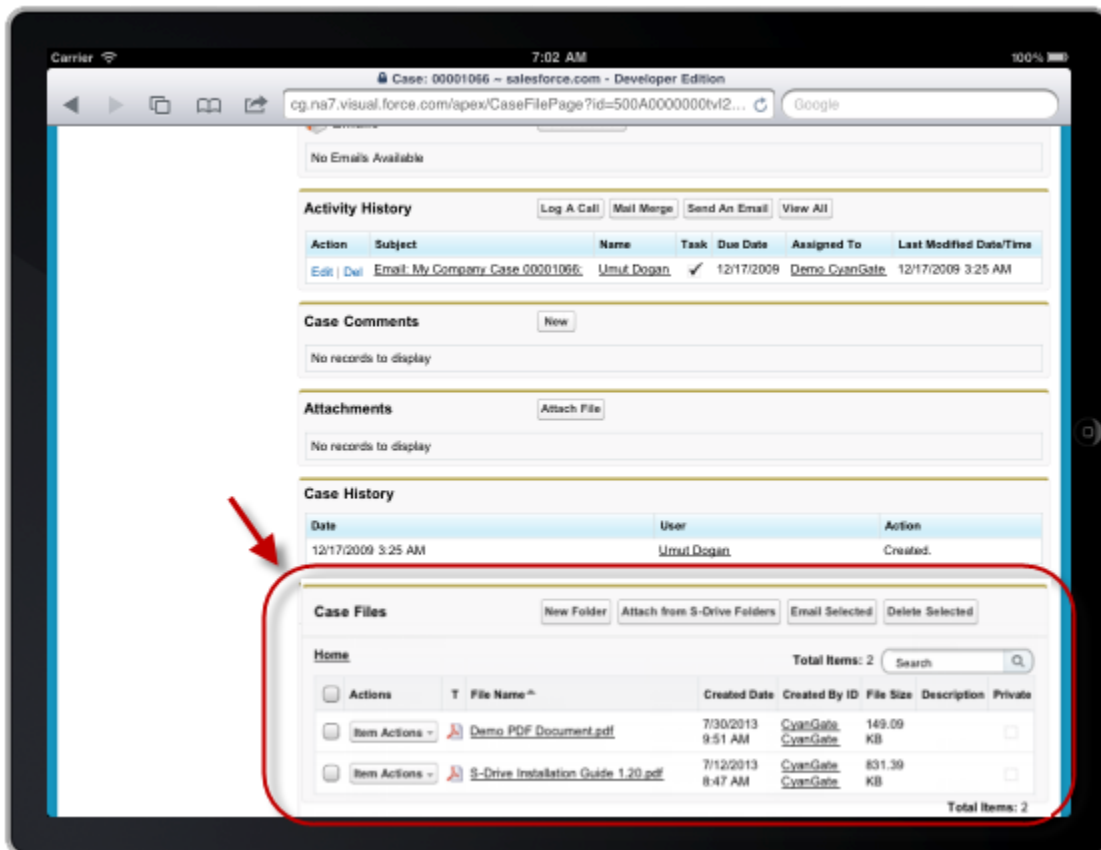


Figure 66

Q. S-Drive Attachments

S-Drive Attachments is the object 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. Account, Case, Contact, and Opportunity S-Drive Attachments are bundled in the S-Drive installation. You just need to make some configuration to start using S-Drive Attachments. Please refer to the "S-Drive Installation Guide" for configuration of the S-Drive Attachments. You can also use S-Drive Attachments for your other standard/custom objects using the instructions in "S-Drive Advanced Configuration Guide".

1. Account Files

After installing S-Drive, if you made the configuration correctly you'll be able to create account files in "Accounts" tab for each account easily. Go to your "Accounts" tab, select an account from the list (or create a new account). If you can see the "Account Files" page block in the current account's page you can keep on reading (Figure 67). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.

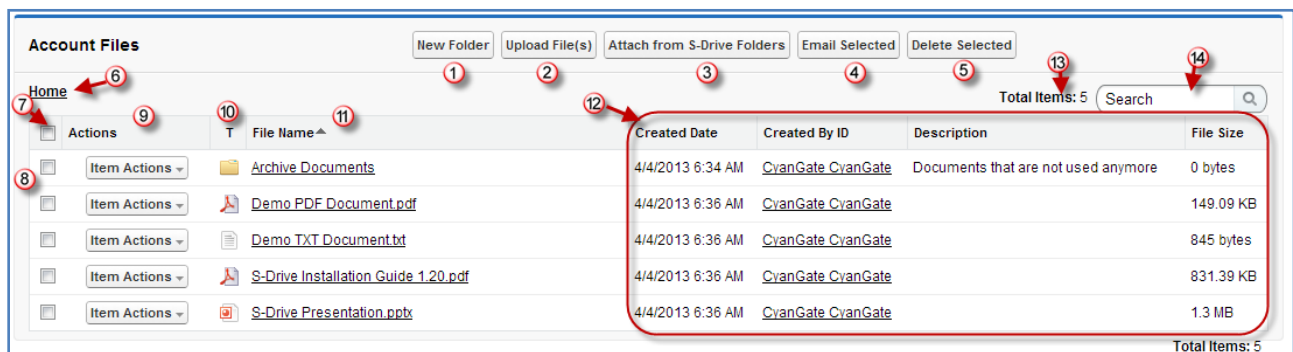


Figure 67

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 67-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 68).

New Folder

Folder Name

Description

Create Cancel

Figure 68

- (2) **"Upload File(s) Button"**: This button is used to add account files to this account (Figure 67-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 69).

After clicking OK, you can select files to upload. This screen is similar to the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.

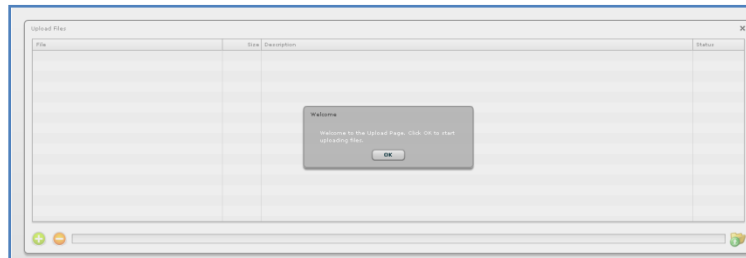


Figure 69

- (3) **"Attach from S-Drive Folders Button"**: This button is used to attach files from S-Drive Folders to this account (Figure 67-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this account (Figure 70-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 70-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed and you can select more files to attach. If you select "No", page will be closed and you'll be redirected to the account page (Figure 70-C). "Cancel Attach" button also redirects you to the account page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

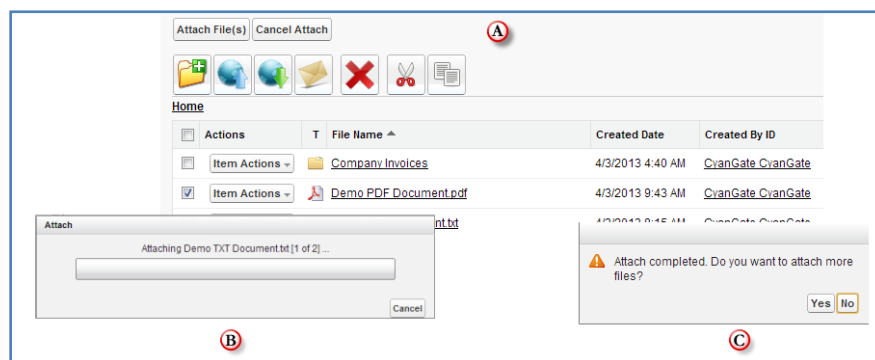


Figure 70

(4) **"Email Selected Button"**: This button is used to email selected account files (Figure 67-4). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying "Please select file(s) to email!" (Figure 71). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

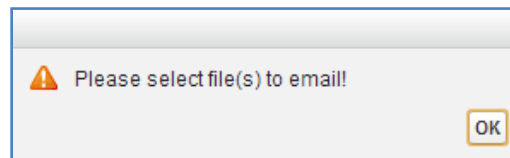


Figure 71

(5) **"Delete Selected Button"**: This button is used to delete selected account files from current account (Figure 67-5). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 72-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 72-B). If you click "Yes", delete process will start.

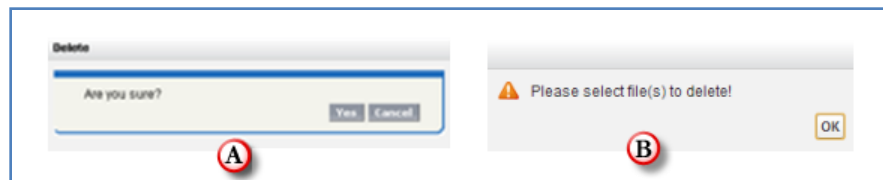


Figure 72

(6) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 67-6). You can click folders above to go to that folder.

(7) **"Select All Option"**: Used to select all account files/folders for deletion/email etc. (Figure 67-7).

(8) **"Select Single Item Option"**: Used to select single account file/folder for deletion/email etc. (Figure 67-8).

(9) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 67-9).

"Download": Used to download selected account file. After clicking this link you'll be warned to select the target location for download. Then you'll be able to download the selected file.

"Copy URL": Used to copy the URL of the selected account file. After clicking this link a popup will appear along with the URL of the selected file (Figure 73). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 74). This item menu action is only for files and not available for folders.

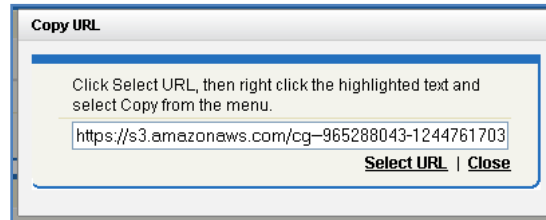


Figure 73

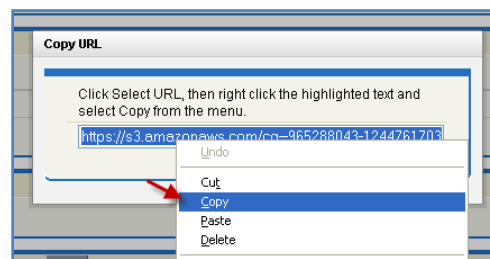


Figure 74

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 75) and you'll be able to edit current account file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

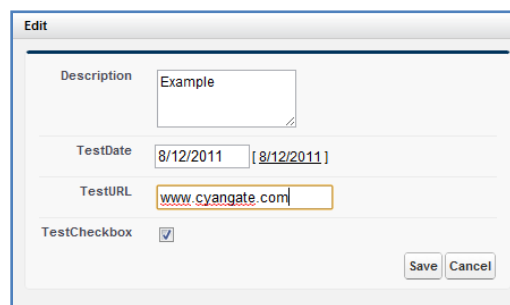


Figure 75

"Delete": Used to delete selected account file/folder. After clicking this link, you'll get a warning message (Figure 72-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.

(10) "Content Type Column": Displays a type icon based on the content type of the account file/folder (Figure 67-10).

- (11) "File Name Column":** File name information for the account files (Figure 67-11). You can sort files/folder ascending or descending by clicking the field header.
- (12) "Customizable Field Columns":** These sections are used to display customizable fields (Figure 67-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.
- (13) "Total Items / Pagination":** Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 67-13). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 76). Total items include only current folder items, not subfolder items. For example if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

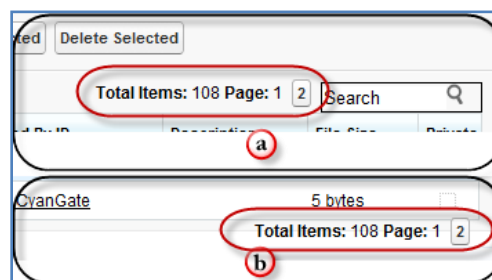


Figure 76

- (14) "Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 67-14 and Figure 77). 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 an '*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.

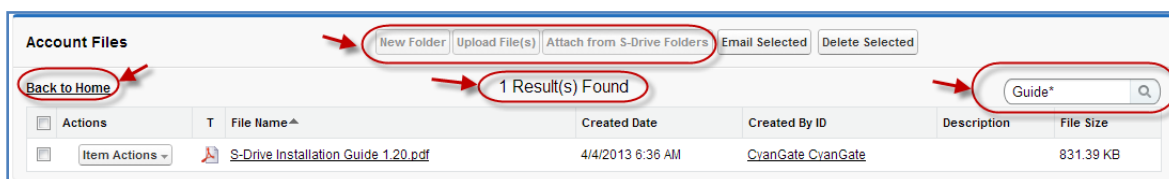


Figure 77



1. You cannot delete an account which has account files attached. You'll get an error message if you try to delete this kind of account (Figure 78). You need to delete account files first, and then you can delete the account.

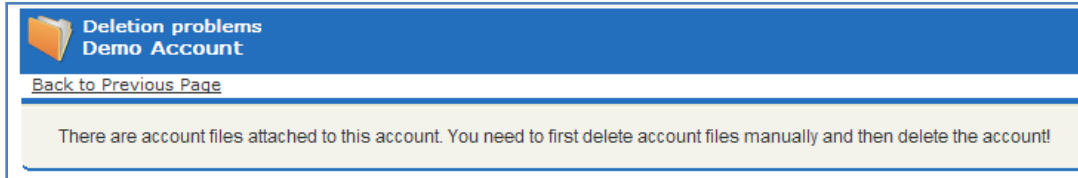


Figure 78

2. Contact Files

After installing S-Drive, if you made the configuration correctly you'll be able to create contact files in "Contacts" tab for each contact easily. Go to your "Contacts" tab, select a contact from the list (or create a new contact). If you can see the "Contact Files" page block in the current contact's page you can keep on reading (Figure 79). Otherwise please consult to the "S-Drive Installation Guide" to activate "Contact Files" section.

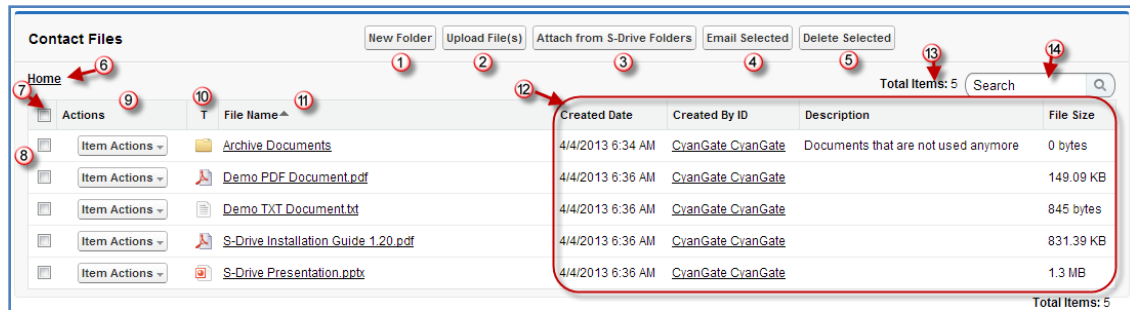


Figure 79

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 79-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 80).

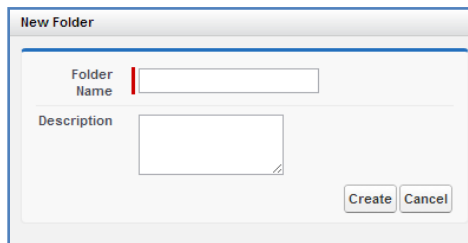


Figure 80

- (2) **"Upload File(s) Button"**: This button is used to add contact files to this contact (Figure 79-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: "Welcome to the Upload Page. Click OK to start uploading files." (Figure 81).

After clicking OK, you can select files to upload. This screen is similar to the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.

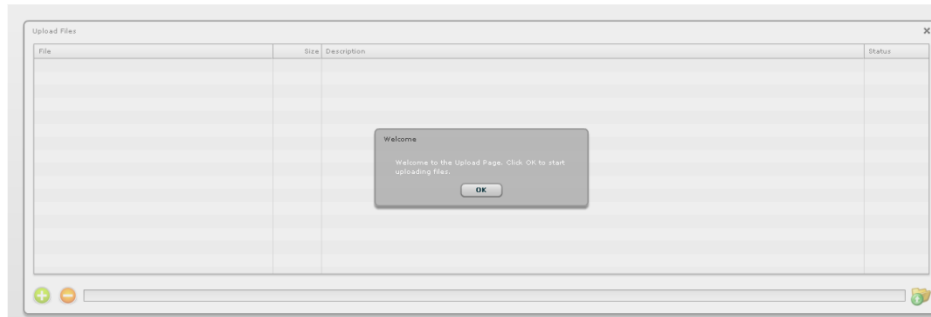


Figure 81

- (3) **"Attach from S-Drive Folders Button"**: This button is used to attach files from S-Drive Folders to this contact (Figure 79-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this contact (Figure 82-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 82-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed and you can select more files to attach. If you select "No", page will be closed and you'll be redirected to the contact page (Figure 82-C). "Cancel Attach" button also redirects you to the contact page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

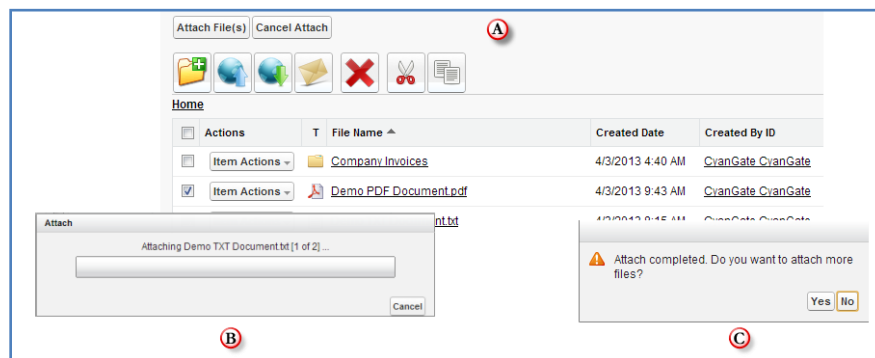


Figure 82

- (4) **"Email Selected Button"**: This button is used to email selected contact files (Figure 79-4). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying "Please select file(s) to email!" (Figure 83). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

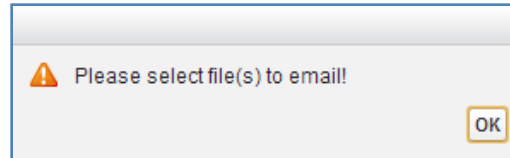


Figure 83

- (5) **"Delete Selected Button"**: This button is used to delete selected contact files from current contact (Figure 79-5). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 84-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 84-B). If you click "Yes", delete process will start.

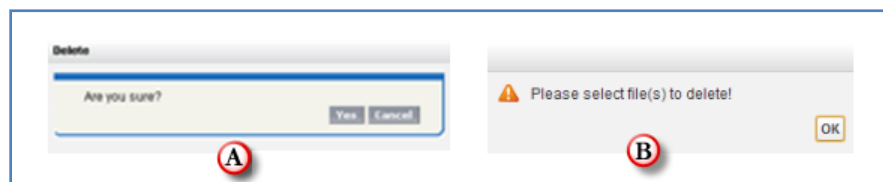


Figure 84

- (6) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 79-6). You can click folders above to go to that folder.
- (7) **"Select All Option"**: Used to select all contact files/folders for deletion/email etc. (Figure 79-7).
- (8) **"Select Single Item Option"**: Used to select single contact file/folder for deletion/email etc. (Figure 79-8).
- (9) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 79-9).

"Download": Used to download selected contact file. After clicking this link you'll be warned to select the target location for download. Then you'll be able to download the selected file.

"Copy URL": Used to copy the URL of the selected contact file. After clicking this link a popup will appear along with the URL of the selected file (Figure 85). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 86).

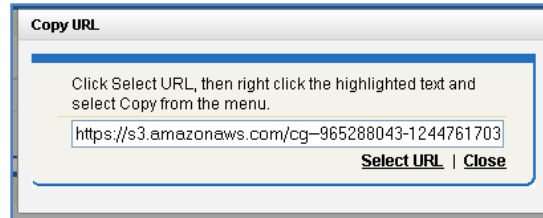


Figure 85

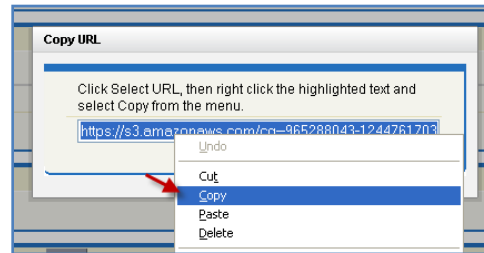


Figure 86

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 87) and you'll be able to edit current contact file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

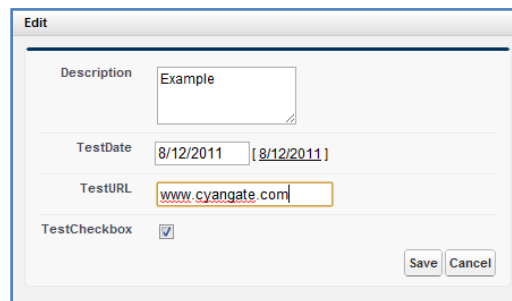


Figure 87

"Delete": Used to delete selected contact file/folder. After clicking this link, you'll get a warning message (Figure 84-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.

(10) "Content Type Column": Displays a type icon based on the content type of the contact file/folder (Figure 79-10).

(11) "File Name Column": File name information for the contact files (Figure 79-11). You can sort files/folder ascending or descending by clicking the field header.

- (12) **"Customizable Field Columns"**: These sections are used to display customizable fields (Figure 79-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.
- (13) **"Total Items / Pagination"**: Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 79-13). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 76). Total items include only current folder items, not subfolder items. For example if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
- (14) **"Search Box"**: You can search for files and folders inside S-Drive Attachments (Figure 79-14 and Figure 77). 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.



Notes

1. You cannot delete a contact which has contact files attached. You'll get an error message if you try to delete this kind of contact (Figure 88). You need to delete contact files first, and then you can delete the contact.

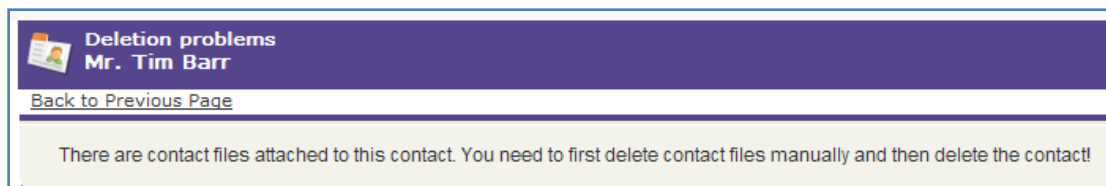


Figure 88

2. You can just upload contact files to contacts that you own. This is a limitation of Salesforce.com. If you try to upload a file to another user's contact, you won't be able to upload the contact file and will be warned: "*insufficient access rights on cross-reference id*".

3. Opportunity Files

After installing S-Drive, if you made the configuration correctly you'll be able to create opportunity files in "Opportunities" tab for each opportunity easily. Go to your "Opportunities" tab, select an opportunity from the list (or create a new opportunity). If you can see the "Opportunity Files" page block in the current opportunity's page you can keep on reading (Figure 89). Otherwise please consult to the "S-Drive Installation Guide" to activate "Opportunity Files" section.

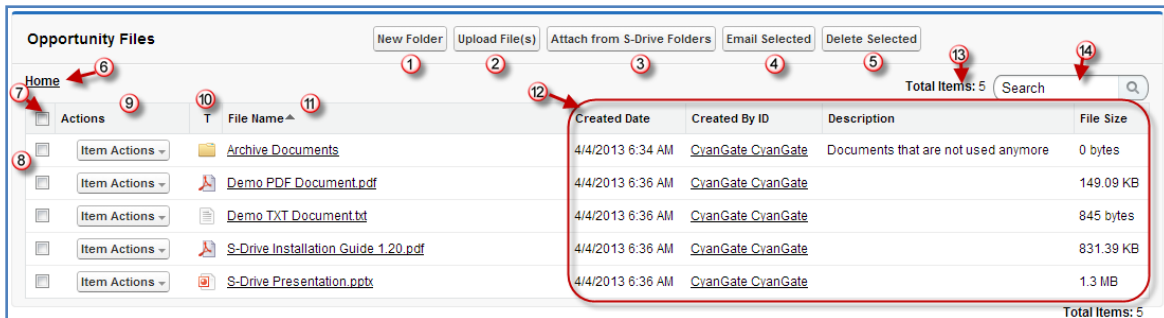


Figure 89

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 89-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 90).

Figure 90

- (2) **"Upload File(s) Button"**: This button is used to add opportunity files to this opportunity (Figure 89-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 91).

After clicking OK, you can select files to upload. This screen is similar to the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.

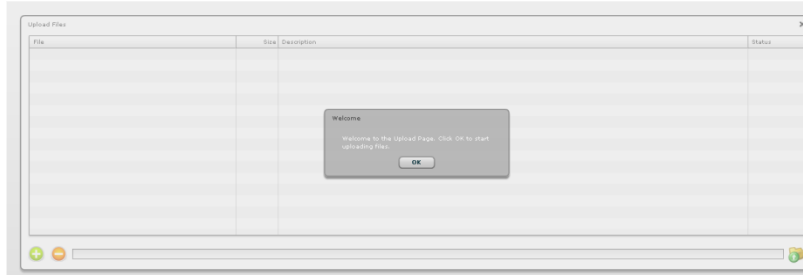


Figure 91

- (3) **"Attach from S-Drive Folders Button"**: This button is used to attach files from S-Drive Folders to this opportunity (Figure 89-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the "current folder information holder" text to attach files to this opportunity (Figure 92-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 92-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed and you can select more files to attach. If you select "No", page will be closed and you'll be redirected to the opportunity page (Figure 92-C). "Cancel Attach" button also redirects you to the opportunity page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

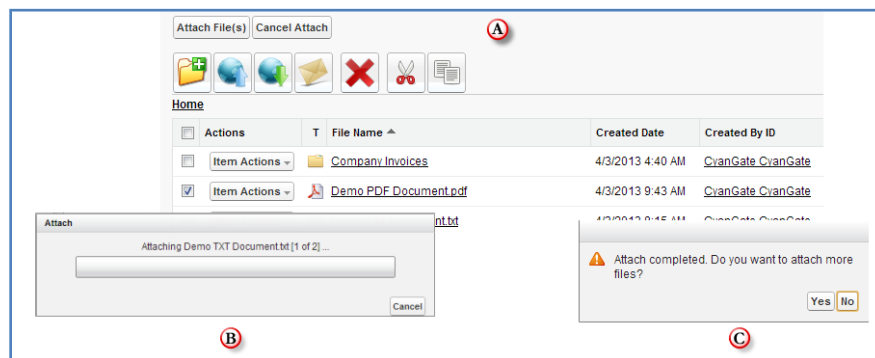


Figure 92

- (4) **"Email Selected Button"**: This button is used to email selected opportunity files (Figure 89-4). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying "Please select file(s) to email!" (Figure 93). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

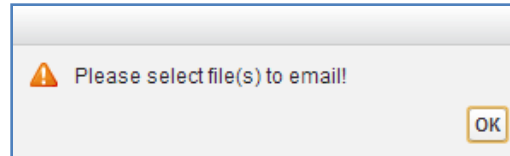


Figure 93

- (5) **"Delete Selected Button"**: This button is used to delete selected opportunity files from current opportunity (Figure 89-5). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 94-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 94-B). If you click "Yes", delete process will start.

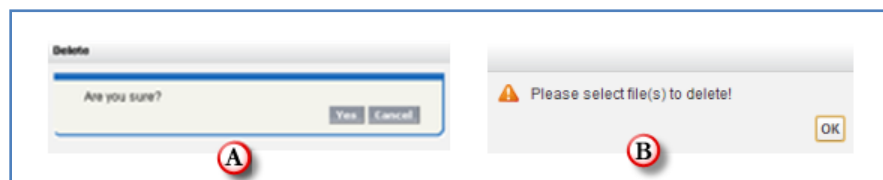


Figure 94

- (6) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 89-6). You can click folders above to go to that folder.
- (7) **"Select All Option"**: Used to select all opportunity files/folders for deletion/email etc. (Figure 89-7).
- (8) **"Select Single Item Option"**: Used to select single opportunity file/folder for deletion/email etc. (Figure 89-8).
- (9) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 89-9).

"Download": Used to download selected opportunity file. After clicking this link you'll be warned to select the target location for download. Then you'll be able to download the selected file.

"Copy URL": Used to copy the URL of the selected opportunity file. After clicking this link a popup will appear along with the URL of the selected file (Figure 95). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 96).

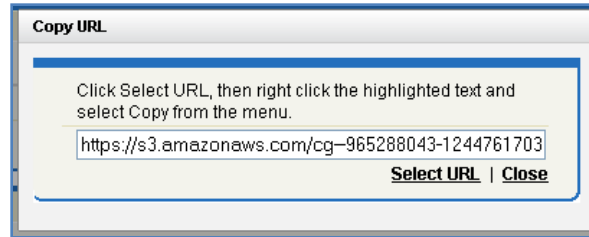


Figure 95

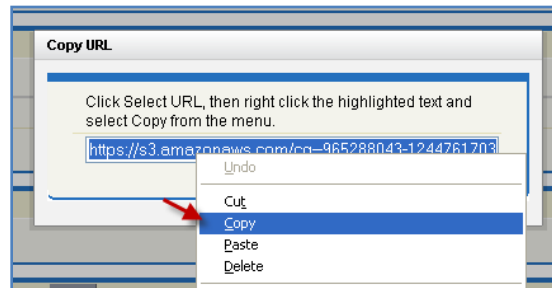


Figure 96

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 97) and you'll be able to edit current opportunity file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

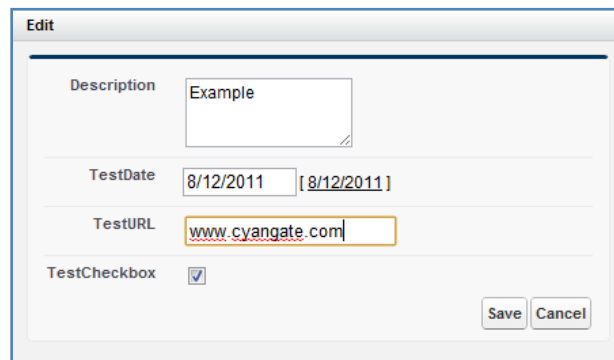


Figure 97

"Delete": Used to delete selected opportunity file/folder. After clicking this link, you'll get a warning message (Figure 94-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.

(10) "Content Type Column": Displays a type icon based on the content type of the opportunity file/folder (Figure 89-10).

(11) "File Name Column": File name information for the opportunity files (Figure 89-11). You can sort files/folder ascending or descending by clicking the field header.

- (12) "Customizable Field Columns":** These sections are used to display customizable fields (Figure 89-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.
- (13) "Total Items / Pagination":** Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 89-13). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 76). Total items include only current folder items, not subfolder items. For example if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
- (14) "Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 89-14 and Figure 77). 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.



Notes

1. You cannot delete an opportunity which has opportunity files attached. You'll get an error message if you try to delete this kind of opportunity (Figure 98). You need to delete opportunity files first, and then you can delete the opportunity.

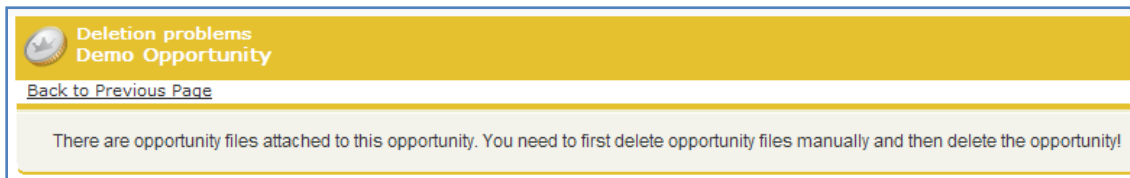


Figure 98

4. Case Files

After installing S-Drive, if you made the configuration correctly you'll be able to create case files in "Cases" tab for each case easily. Go to your "Cases" tab, select a case from the list (or create a new case). If you can see the "Case Files" page block in the current case's page you can keep on reading (Figure 99). Otherwise please consult to the "S-Drive Installation Guide" to activate "Case Files" section.

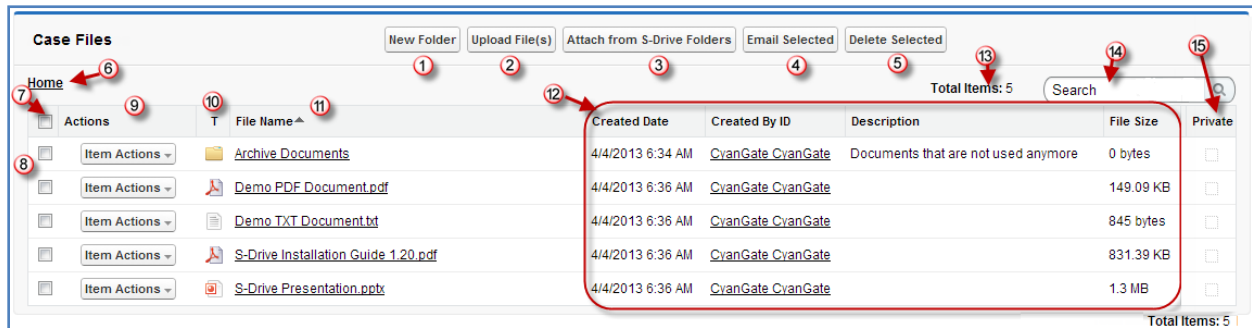


Figure 99

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 99-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 100).

Figure 100

- (2) **"Upload File(s) Button"**: This button is used to add case files to this case (Figure 99-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: "Welcome to the Upload Page. Click OK to start uploading files." (Figure 101).

After clicking OK, you can select files to upload. This screen is similar to the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.

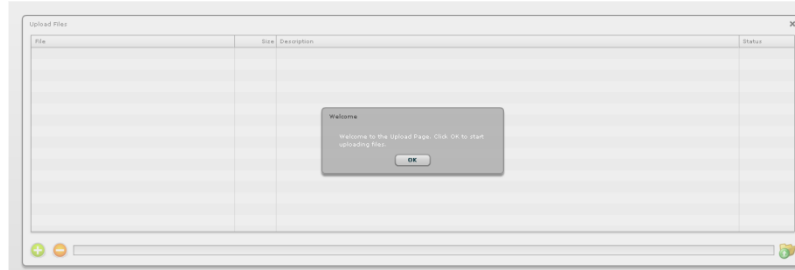


Figure 101

- (3) **"Attach from S-Drive Folders Button"**: This button is used to attach files from S-Drive Folders to this case (Figure 99-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the "current folder information holder" text to attach files to this case (Figure 102-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 102-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed and you can select more files to attach. If you select "No", page will be closed and you'll be redirected to the case page (Figure 102-C). "Cancel Attach" button also redirects you to the case page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

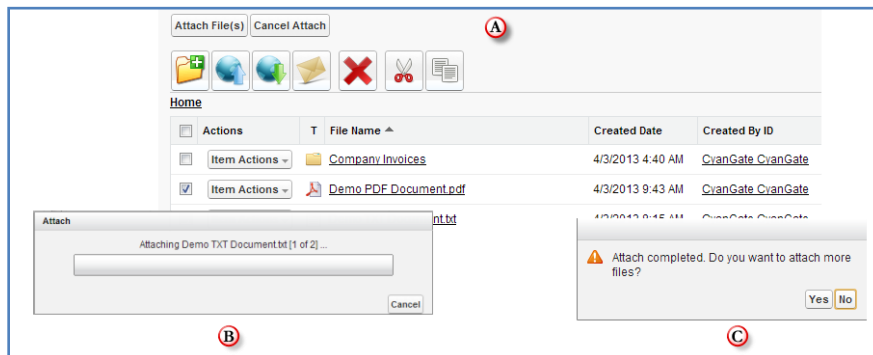


Figure 102

- (4) **"Email Selected Button"**: This button is used to email selected case files (Figure 99-4). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying "Please select file(s) to email!" (Figure 103). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

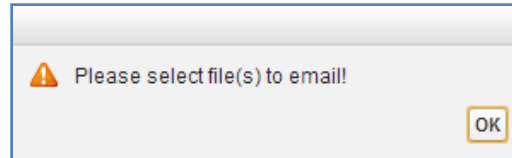


Figure 103

- (5) **"Delete Selected Button"**: This button is used to delete selected case files from current case (Figure 99-5). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 104-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 104-B). If you click "Yes", delete process will start.

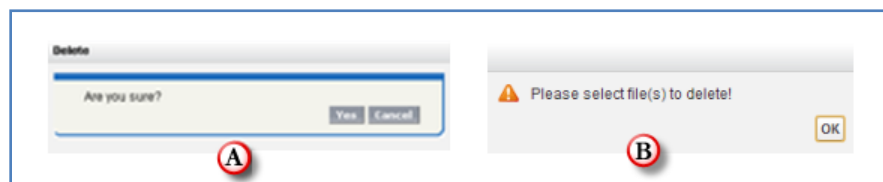


Figure 104

- (6) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 99-6). You can click folders above to go to that folder.
- (7) **"Select All Option"**: Used to select all case files/folders for deletion/email etc. (Figure 99-7).
- (8) **"Select Single Item Option"**: Used to select single case file/folder for deletion/email etc. (Figure 99-8).
- (9) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 99-9).

"Download": Used to download selected case file. After clicking this link you'll be warned to select the target location for download. Then you'll be able to download the selected file.

"Copy URL": Used to copy the URL of the selected case file. After clicking this link a popup will appear along with the URL of the selected file (Figure 105). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 106).

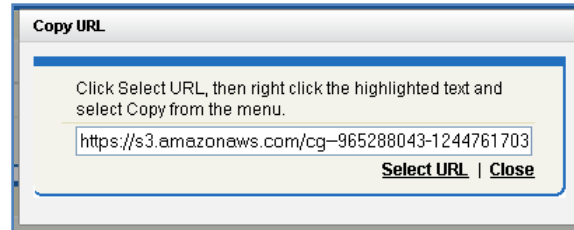


Figure 105

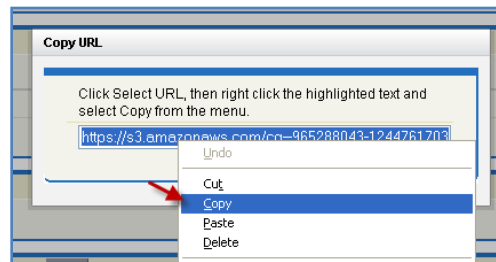


Figure 106

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 107) and you'll be able to edit current case file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

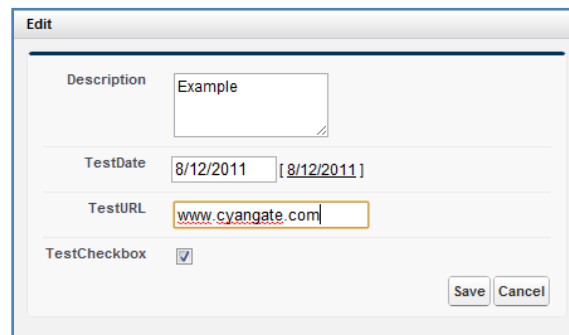


Figure 107

"Delete": Used to delete selected case file/folder. After clicking this link, you'll get a warning message (Figure 104-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.

(10)"Content Type Column": Displays a type icon based on the content type of the case file/folder (Figure 99-10).

(11)"File Name Column": File name information for the case files (Figure 99-11). You can sort files/folder ascending or descending by clicking the field header.

- (12) "Customizable Field Columns":** These sections are used to display customizable fields (Figure 99-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.
- (13) "Total Items / Pagination":** Displays total items in selected folder and pagination if number of items are greater than the configured pagination number (Figure 99-13). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 76). Total items include only current folder items, not subfolder items. For example if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
- (14) "Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 99-14 and Figure 77). 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.
- (15) "Private":** This checkbox is used to determine if the individual S-Drive attachment will be visible to the customer portal users (Figure 99-15). If the attachment is set to private, customer portal users won't be able to see the private file. File can be set to private/public in Upload Screen before uploading or anytime from Edit Screen. See "*S-Drive Advanced Configuration Guide – Creating Custom Object Files*" section for more information about the public/private flag.
- (16)**



Notes

1. You cannot delete a case which has case files attached. You'll get an error message if you try to delete this kind of case (Figure 108). You need to delete case files first, and then you can delete the case.

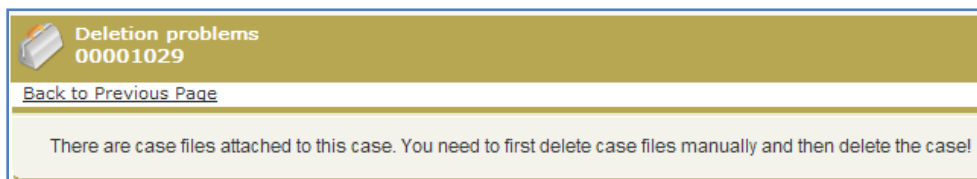


Figure 108



2. You can use "Case Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Advanced Configuration Guide* for more information), your customers can add case files to cases using "Customer Portal Interface" (Figure 109).

Case Files		Upload File	Delete Selected			
<input type="checkbox"/>	Actions	File Name	File Size	Created By	Created Date	Description
<input type="checkbox"/>	Download Edit Del	Demo Document.txt	15 bytes	Bulent Dogan	8/21/2009 6:30 AM	

Figure 109

5. Other Standard/Custom Object Files

You can use “files” for standard/custom objects other than Accounts, Contacts, Opportunities, and Cases easily. Go to your object’s tab, select an object from the list (or create a new object). If you can see the “<Your Object Name> Files” page block in the current object's page you can keep on reading (Figure 110). Otherwise please consult to the “S-Drive Advanced Configuration Guide” to activate “<Your Object Name> Files” section.

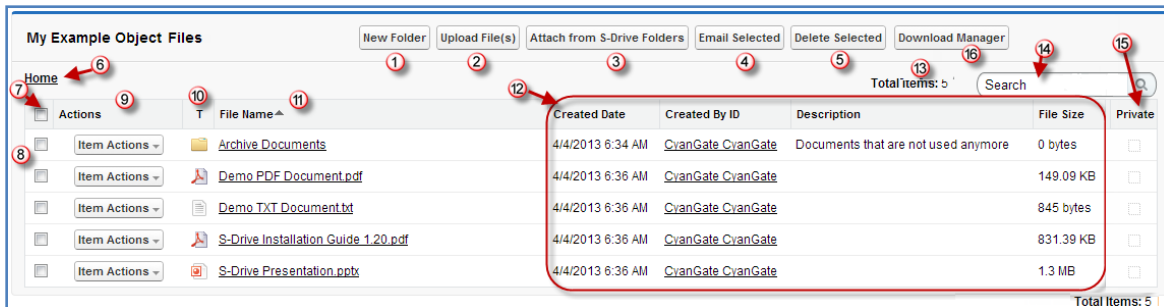


Figure 110

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 110-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button. Also note that all fields related to custom object will be displayed in the new folder creation screen (Figure 111).

Figure 111

- (2) **"Upload File(s) Button"**: This button is used to add object files to this object (Figure 110-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: "Welcome to the Upload Page. Click OK to start uploading files." (Figure 112).

After clicking OK, you can select files to upload. This screen is similar to the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.

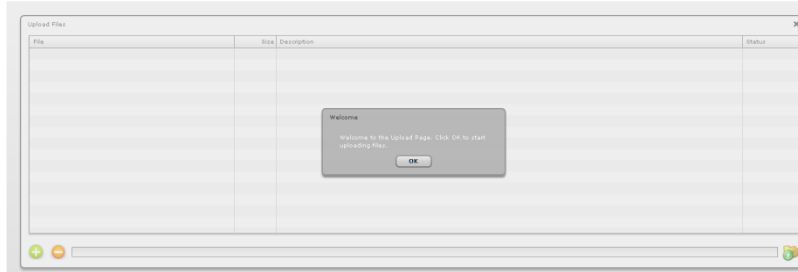


Figure 112

- (3) **"Attach from S-Drive Folders Button"**: This button is used to attach files from S-Drive Folders to this object (Figure 110-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the "current folder information holder" text to attach files to this object (Figure 113-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 113-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed and you can select more files to attach. If you select "No", page will be closed and you'll be redirected to the object page (Figure 113-C). "Cancel Attach" button also redirects you to the object page. You can cancel the attach process while it is in progress by clicking orange close button on the bottom-right corner of the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

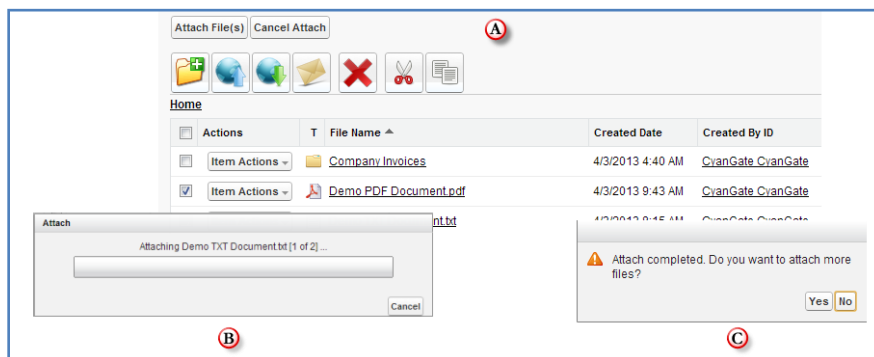


Figure 113

- (4) **"Email Selected Button"**: This button is used to email selected object files (Figure 110-4). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying "Please select file(s) to email!" (Figure 114). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

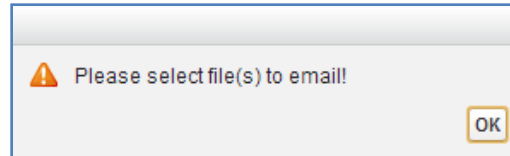


Figure 114

- (5) **"Delete Selected Button"**: This button is used to delete selected object files from current object (Figure 110-5). To use this button you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 115-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 115-B). If you click "Yes", delete process will start.

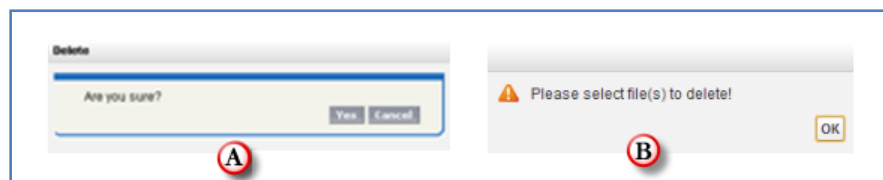


Figure 115

- (6) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 110-6). You can click folders above to go to that folder.
- (7) **"Select All Option"**: Used to select all object files/folders for deletion/email etc. (Figure 110-7).
- (8) **"Select Single Item Option"**: Used to select single object file/folder for deletion/email etc. (Figure 110-8).
- (9) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 110-9).

"Download": Used to download selected object file. After clicking this link you'll be warned to select the target location for download. Then you'll be able to download the selected file.

"Copy URL": Used to copy the URL of the selected object. After clicking this link a popup will appear along with the URL of the selected file (Figure 116). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 117).

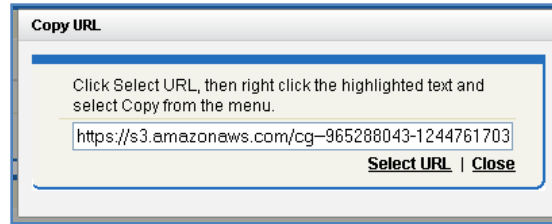


Figure 116

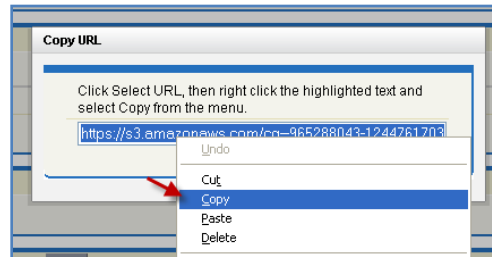


Figure 117

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 118) and you'll be able to edit current object file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

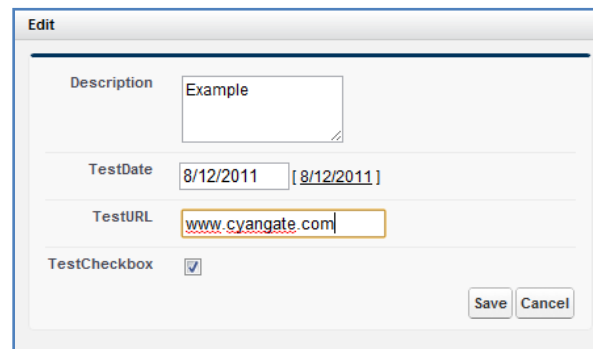


Figure 118

"Delete": Used to delete selected object file/folder. After clicking this link, you'll get a warning message (Figure 115-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.

(10)"Content Type Column": Displays a type icon based on the content type of the custom object file/folder files (Figure 110-10).

(11)"File Name Column": File name information for the object files (Figure 110-11). You can sort files/folder ascending or descending by clicking the field.



(12) "Customizable Field Columns": These sections are used to display customizable fields (Figure 110-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13) "Total Items / Pagination": Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 110-13). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 76). Total items include only current folder items, not subfolder items. For example if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

(14) "Search Box": You can search for files and folders inside S-Drive Attachments (Figure 110-14 and Figure 77). 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.

(15) "Private": This checkbox is used to determine if the individual S-Drive attachment will be visible to the customer portal users (Figure 110-15). If the attachment is set to private, customer portal users won't be able to see the private file. File can be set to private/public in Upload Screen before uploading or anytime from Edit Screen. See "*S-Drive Advanced Configuration Guide—Creating Custom Object Files*" section for more information about the public/private flag.

(16) "Download Manager": This button is used to download files using Download Manager (Figure 110-16). See "*Download Manager Download*" section for more information about download manager.



1. If your system administrator set a before delete trigger for your object you cannot delete an object which has object files attached. You'll get an error message if you try to delete this kind of object (Figure 119). You need to delete object files first, and then you can delete the object.

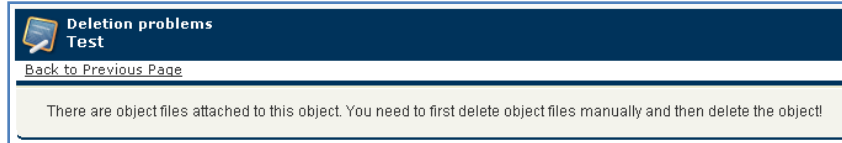


Figure 119

2. You can use "<Your Object Name> Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Advanced Configuration Guide* and *S-Drive Customer Portal Guide* for more information), your customers can add object files to your objects using "Customer Portal Interface".

6. SDriveTools API

You can use SDriveTools API calls for programmatically interacting with S-Drive Attachments.

a. getAttachmentURL()

This method is used to get the URL of an S-Drive Attachment.

```
String getAttachmentURL(String parentId, String fileObjectId,
    Long timeValue)
```

Parameters:

parentId: Id of the parent object. You can use 15-character id or 18-character id.

fileObjectId: Id of the attachment (file) object. This can be retrieved using an SOQL query. An example can be found in following sections.

timeValue: Expiration time of the link in seconds.

Return Value: The method will return the URL of the S-Drive attachment.

Our example is about retrieving an image file from S-Drive Account Attachments and displaying it inside Account Page Layout. You can customize SOQL call and other options similar to the example.

1. First override Accounts View button with Account Files Page to upload a JPG image file to S-Drive Account Attachments. (Figure 120)

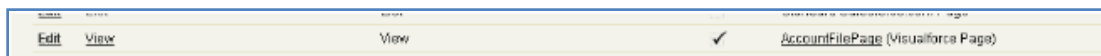


Figure 120

2. Upload a jpg image file into one of your accounts using Upload File(s) button. (Figure 121)

Account Files						
Actions	File Name	File Size	Created By	Created Date	Description	
Download Copy URL Edit Del	a23_17907277.jpg	283.89 KB	CyanGate CyanGate	7/26/2010 7:09 AM	Image	

Figure 121

3. Create an apex class named ExamplePageController. In below code 1*60 is equivalent to one minute. You can set expiring time like this. Also you can configure your SOQL query based on your needs. (Figure 122)

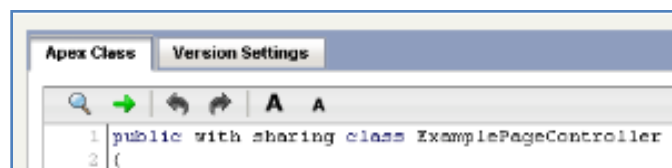


Figure 122

```

public with sharing class ExamplePageController
{
    private Account acct;
    private String fileURL = "";

    public ExamplePageController(ApexPages.StandardController controller)
    {
        this.acct = (Account)controller.getRecord();

        List<cg__AccountFile__c> accountFiles = [Select id from cg__AccountFile__c where
        cg__AccountFile__c.cg__WIP__c = false and cg__AccountFile__c.cg__Content_Type__c =
        'image/jpg' and cg__AccountFile__c.cg__Account__c = :acct.id];

        if(accountFiles.size() > 0)
        {
            fileURL = cg.SDriveTools.getAttachmentURL(acct.id, accountFiles[0].id, (1 * 60));
        }
        else
        {
            fileURL = 'http://www.cyangate.com/noimage.jpg';
        }
    }
    public String getFileURL()
    {
        return fileURL;
    }
}

```

4. Create an ExamplePage apex page with below content. (Figure 123)

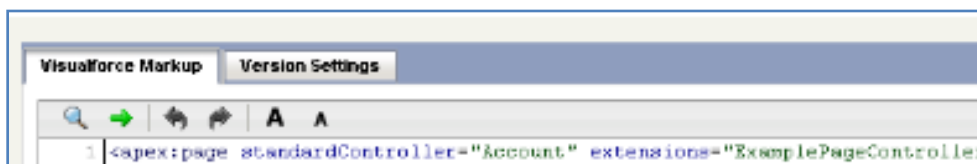


Figure 123

```

<apex:page standardController="Account" extensions="ExamplePageController">
    <apex:image url="{!fileURL}" />
</apex:page>

```

5. Customize your account page layout and include ExamplePage inside the layout. (Figure 124)

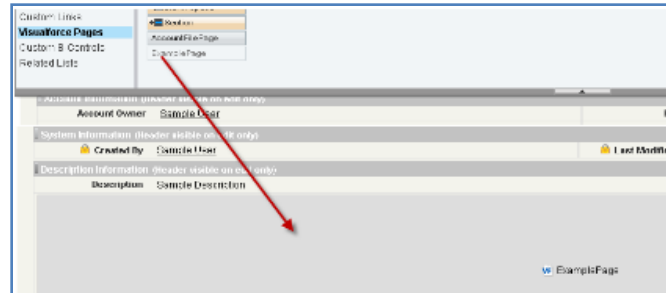


Figure 124

6. Now if you reload your account (which contains an image file) you'll see a screen like below. You can customize the apex class and page based on your needs. (Figure 125)

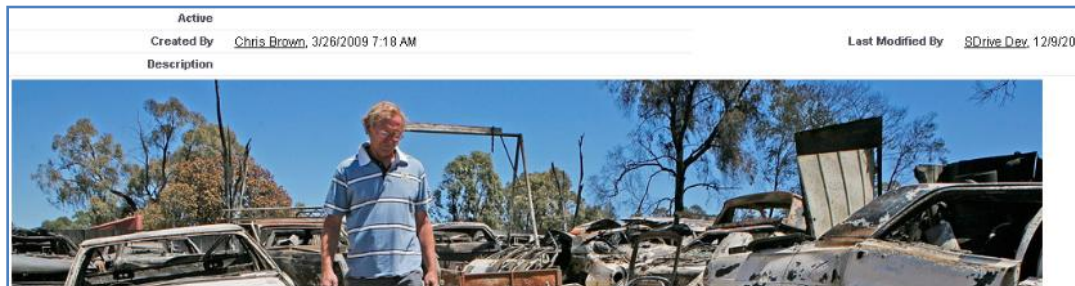


Figure 125

a. `getAttachmentURLs()`

This method is used to get multiple URLs for multiple objects of an S-Drive Attachment at a time.

```
List<String> getAttachmentURLs(List<ID> parentIds, List<ID>
    fileObjectIds, Long timeValue)
```

```
List<String> getAttachmentURLs(List<ID> parentIds, List<ID>
    fileObjectIds, Long timeValue, Map<String,String> requestParameters)
```

Parameters:

parentIds: List of Salesforce ids of the parent objects. You can use 15-character id or 18-character id.

fileObjectIds: List of Salesforce ids of the attachment (files) objects.

timeValue: Expiration time of the links in seconds.

requestParameters: Map of request parameters and their values to set the parameters in the response (e.g. ('*response-content-disposition*', '*inline; filename=myfile.png*')). For more information visit the Amazon documentation:

<http://docs.aws.amazon.com/AmazonS3/latest/API/RESTObjectGET.html>

Return Value: The method will return the list of URLs of the S-Drive attachment.



b. `id15to18()`

This method is used to convert Salesforce Ids from 15 characters to 18 characters.

```
String id15to18(String inID)
```

Parameters:

inID: 15-character Salesforce id.

Return Value: The method will return the 18-character Salesforce id.

c. `getAccessKey()`

This method is used to get the AccessKey for setting the *AWSAccessKeyId* parameter during uploads.

```
String getAccessKey()
```

d. `getBucketName()`

This method is used to get the Bucket Name for setting the *S3 bucket* parameter during uploads.

```
String getBucketName()
```

e. `getUserToken()`

This method is used to get the User Token for setting the *x-amz-security-token* parameter during uploads.

```
String getUserToken()
```

f. `deleteFiles()`

This method is used to delete files stored as attachments or under S-Drive folders.

```
List<ResultObject> deleteFiles(List<ID> wipIds, String objectId)
```

Parameters:

wipIds: List of Salesforce.com IDs of “file” records (either attachments or S-Drive Folder files).

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com ID.

Return Value: The method will return a list of ResultObject (Figure 127) which holds delete status information for each file record.



Example code:

```
List<Id>wiplds = new List<Id>();  
wiplds.add(ID.valueOf(uploadRequestInfos .fileWipld));  
List<cg.ResultObject>resultObjects = cg.SDriveTools.deleteFiles(wiplds, objectId);
```

g. initializeUpload()

This method is used to initialize attachment uploads.

```
List<UploadRequestInfo> initializeUpload  
(String objectId, List<SObject> attachments, Map<String,String> policyMap)
```

Parameters:

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com id. For example, this ID is the ID of the case record if the attachments are being uploaded for a case.

attachments:List of Salesforce SObject for uploading. The SObject will be representing the “File” object. For example, for a Case attachment, the SObject will be representing the cg__CaseFile__c record.

policyMap: Map of policy conditions and their values that represent the additional policy parameters used during upload (e.g. (*'\$Content-Disposition', 'attachment; filename'*)). For more information visit the Amazon documentation:

<http://docs.aws.amazon.com/AmazonS3/latest/API/RESTObjectPOST.html>

Return Value: The method will return the list of UploadRequestInfo (Figure 126), which holds information about the files that are about to be uploaded.

The following steps are executed within this method:

1. Validate the input with the following rules:
 - a. If the uploaded attachments are of type S3Object (i.e. files in S-Drive tab), the Parent__c field should be the same for all files.
 - b. If the uploaded attachments are of type S3Object (i.e. files in S-Drive tab), there should not be an existing file with the same name in the same folder.
 - c. File name and file size can't be blank
 - d. File name can't include the following characters: \ / : * ? \ " < > | ~
 - e. File size can't be zero.
 - f. File size can't be more than the Max file size defined in S-Drive Configuration.



2. Create the file record in Salesforce with work in progress state (WIP__c = true) (i.e. create SObject, Case File, Custom Object File, etc).
3. Calculate policy, signature, file name etc. in order to be used as the POST parameters. While calculating the policy, policyMap parameter is used to generate different parameters in the policy. For html upload please reference Figure 128 and for flash uploads please reference Figure 129.
4. Returns a list of UploadRequestInfo (Figure 126) objects.

Example code:

```
List<SObject>attachments = new List<SObject>();

My_Example_Object_File__c attachment = new My_Example_Object_File__c ();

attachment.File_Name__c = 'Example.txt';

attachment.File_Size_in_Bytes__c ='100';

attachment.Parent__c = 'a0180...';

String objectId = String.valueOf(attachment.Parent__c);

attachments.add(attachment);

Map<String, String> policyMap= new Map<String,String>();

policyMap.put('Content-Disposition','attachment; filename');

List<cg.UploadRequestInfo> uploadRequestInfos=

cg.SDriveTools.initializeUpload(objectId ,attachments, policyMap );
```



1- It is required to set SObject's File_Name__c, File_Size_in_Bytes__c and Parent__c fields. You can optionally set other custom fields.

2-For S-Drive Attachments files, Parent__c refers to its parent object id. In order to set the parent folder id, use Parent_Folder_Id__c field. For S-Drive Folders files, Parent__c refers to its parent folder id and if you want to upload the file to home folder set this to **null**. Also for S-Drive Folders files, objectId must to be set to **null**.

3- If you put expiration, *acl*, *bucket*, *key*, *x-amz-server-side-encryption* and *x-amz-security-token* conditions in the **policyMap**, these parameters will be ignored. Because, these are being set in the initializeUpload () method. You do not need to put these parameters in the **policyMap**. But, you must use these parameters while uploading. For this, please reference Figure 130.

g. completeUpload()

This method is used to complete attachments upload once the files have been uploaded to Amazon S3.

```
List<ResultObject> completeUpload(List<ID> wipIds)
```

Parameters:

wipIds: List of Salesforce ids for attachment “file” records. These IDs have been returned from the initializeUpload() method for each file record.

Return Value: The method will return the list of ResultObject (Figure 127), which holds filecompletion status information.



Notes

1. If you want to confirm that file(s) are successfully uploaded to Amazon, you can use the *getAmazonHeader()* method to get headers which is returned by Amazon S3 for a given file. You can also compare the *ETag* header, the MD5 checksum calculated by Amazon when the file is uploaded to S3, with the MD5 that you calculate for the file(s).
2. If you set the *success_action_status* to 201 status code during the upload process, you can also use XML document which is returned by Amazon S3 to compare *ETag* header with MD5 check sum.

Example code:

```
List<Id>wipIds = new List<Id>();  
  
wipIds.add(ID.valueOf(uploadRequestInfos .fileWipId));  
  
List<cg.ResultObject>resultObjects = cg.SDriveTools.completeUpload(wipIds);
```

h. cancelUpload()

This method is used to cancel attachment upload operation.

```
List<ResultObject> cancelUpload(List<ID> wipIds, String objectId)
```

Parameters:

wipIds: List of Salesforce.com IDs of attachment “file” records.

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com ID.



Return Value: The method will return a list of ResultObject (Figure 127) which holds cancel status information for each file record.

Example code:

```
List<Id>wiplds = new List<Id>();  
wiplds.add(ID.valueOf(uploadRequestInfos .fileWipld));  
List<cg.ResultObject>resultObjects = cg.SDriveTools.cancelUpload(wiplds, objectId);
```

i. getAmazonHeaders()

This method is intended to be used to get response headers and its values from Amazon after an upload in order to verify the successful upload of the files.

```
Map<String,String> getAmazonHeaders(String item)
```

Parameters:

item: File location/key of uploaded file.

Return Value: The method will return the map of response headers and its values (e.g. ETag)

Example code:

```
Map<String,String> headResponse = cg.SDriveTools.getAmazonHeaders(uploadRequestInfos  
.fileLocation);
```

```
UploadRequestInfo  
  
String fileName{get; set;}  
String fileLocation{get; set;}  
String fileSize{get; set;}  
String fileType{get; set;}  
String wipFileId{get; set;}  
String signature{get; set;}  
String policy{get; set;}
```

Figure 126

```
ResultObject  
  
String status {get;set;} // success – fail  
String errorMessage {get;set;} // null if status is success  
String wipFileId {get;set;} // to see which file failed
```

Figure 127

j. Uploading Files to S-Drive (Amazon S3)

You can use SDriveTools API calls for uploading the S-Drive Attachments/Folders Files to Amazon. For this, you will need to use below methods:

- *initializeUpload()*
- *completeUpload()*
- *cancelUpload()*
- *getAccessKey()*
- *getBucketName()*
- *getUserToken()*

Before upload, you must first initialize attachment upload. Initializing the attachment upload creates work in progress (WIP) file(s) objects (S3Object, Case File, My Example Object File, etc.) and calculates the required file information for the upload process. For initializing attachment upload, use *initializeUpload()* method.



The next step is uploading the file(s) to Amazon using html, flash, etc. upload. When you upload file(s) to Amazon, You should use the information which has been returned by *initializeUpload()* as well as the values retrieved from *getAccessKey()*, *getBucketName()* and *getUserToken()* methods.

If upload is successful, you must complete attachment upload. Complete attachment upload means updating WIP file records created during initialize upload call and set the *WIP__c* field value as *false*. For completing attachment upload, use *completeUpload()* method.

If upload fails, you must cancel upload. Canceling upload means deleting the WIP file records. For canceling attachment upload, use *cancelUpload()* method.

Html Policy

```
{
  "expiration": "2014-03-12T12:47:13.893Z",
  "conditions":
  [
    {"acl": "private" },
    {"bucket": "cg--81..." },
    ["starts-with", "$Content-Disposition", "attachment; filename"],
    ["starts-with", "$key", "a038..."],
    {"x-amz-server-side-encryption": "AES256"},
    {"x-amz-security-token": "{User Token}AAYHVX..."},
  ]
}
```

Figure 128

Flash Policy

```
{
  "expiration": "2014-03-12T13:34:02.884Z",
  "conditions":
  [
    {"acl": "private" },
    {"bucket": "cg--81..." },
    ["starts-with", "$Content-Disposition", "attachment; filename"],
    ["starts-with", "$key", "a038..."],
    {"success_action_status": "201" },
    ["starts-with", "$Filename", ""],
    ["starts-with", "$Content-Type", ""],
    {"x-amz-server-side-encryption": "AES256"},
    {"x-amz-security-token": "{UserToken}AAYHVX..."},
  ]
}
```

Figure 129



Exceptions and Reasons for Upload Operations

- [SDriveException]** *“Parent Folder IDs must be the same for all file records that are being uploaded”.*

[Reason] If Parent__c values which are passed in with the SObjects are not same for all SObject.

[Solution] Give the parent folder ids the same for all SObjects.
- [SDriveException]** *“A file with the same name exists in the target folder (fileName) ”.*

[Reason] This exception occurs if a file with the same name exists in the same folder for SObjects. The same file name condition holds when the file is not a WIP (WIP__c =false) file or the file is a WIP file (WIP__c =true) with the same file name but it has been uploaded by another user less than 12 hours ago.

[Solution] Upload files with different file names or delete the previously existing files before the upload.
- [SDriveException]** *“Error occurred while checking the files to upload! File Name, File Size cannot be blank (fileName)”.*

[Reason] If the file name or file size fields that have been passed in with the SObject are null or empty.

[Solution] File name and file size is required for upload. Thus, pass non-blank values in with the SObject.
- [SDriveException]** *“Name cannot start with a space or a dot and cannot contain any of the following characters: \\/: *? \ "< > | ~ (fileName)”.*

[Reason] If the file name is invalid. Invalid name means, file name starts with a space or a dot and contains any of the following characters: \\/: *? \ "< > | ~

[Solution] Do not upload a file with the name starting with space or a dot and contain any of the following characters: \\/: *? \ "< > | ~
- [SDriveException]** *“You cannot upload a zero-length file (fileName)”.*

[Reason] If the file size is 0.

[Solution] Upload files that are greater in size than zero.
- [SDriveException]** *“Files greater than (maxFileSize) cannot be uploaded. Please contact your system administrator for the file size limits! (fileName)”.*

[Reason] File being uploaded has a size greater than the maximum file size limit (MAX_FILE_SIZE configuration in S-Drive Configuration page).

[Solution] Do not upload files whose size greater than MAX_FILE_SIZE. Or Increase the MAX_FILE_SIZE configuration in S-Drive Configuration page.



7. **[SDriveException]** *“Invalid parent id specified. Check your function parameters!”*.
[Reason] If object (parent) id, which is passed as a parameter, is not a Salesforce.com 15 or 18 characters long ID.
[Solution] Pass 15-character or 18-character Salesforce.com ID as objectId parameter.

Error Messages of *ResultObject* and Reasons

1. **[errorMessage]** *“Wip Id is null! ”*.
[Reason] If wipId in the wipIds list parameter is null.
[Solution] Do not pass null Salesforce.com IDs of file objects.
2. **[errorMessage]** *“No such wip file with provided id: (wipId) ”*.
[Reason] If wipId in wipIds list is not available.
[Solution] Pass correct and available Salesforce.com ids of files objects.
3. **[errorMessage]** *“There is no wip files”*.
[Reason] If all of wipId in wipIds list is null or wipIds’ size is 0.
[Solution] Pass wipIds with length greater than 0 and non-null string values.
4. **[errorMessage]** *“ Insufficient Privileges. You do not have not access to update operation”*.
[Reason] If Object-level security for update access is not allowed.
[Solution] Make sure that update access is allowed for your profile.



Html upload example:

```
<form>
```

```
File : <input type="file" name="file" id="file" />
```

```
      <input type="button" value="Upload" onclick="htmlUpload();" />
```

```
</form>
```

```
<script type="text/javascript">
```

```
var uploadFile ;
```

```
document.getElementById('file').addEventListener('change', handleFileSelect,false);
```

```
function handleFileSelect(evt)
```

```
{
```

```
    var fileName = evt.currentTarget.files[0].name ;
```

```
    var fileSize = evt.currentTarget.files[0].size;
```

```
    uploadFile = evt.currentTarget.files[0];
```

```
    //Call initializeUpload() method
```

```
}
```

```
function htmlUpload()
```

```
{
```

```
    var fd = new FormData();
```

```
    fd.append('key', '{!uploadRequestInfos.fileLocation}');
```

```
    fd.append('AWSAccessKeyId', '{!accessKey}');
```

```
    fd.append('acl', 'private');
```

```
    fd.append('policy', '{!uploadRequestInfos.policy}');
```

```
    fd.append('signature', '{!uploadRequestInfos.signature}');
```

```
    fd.append('x-amz-security-token', '{!userToken}');
```

```
    fd.append('x-amz-server-side-encryption', 'AES256');
```

```
    fd.append('Content-Disposition', 'attachment; filename=\'"+ '{!uploadRequestInfos.fileName}' +\'');
```

```
    fd.append("file",uploadFile);
```

```
    var xhr = new XMLHttpRequest();
```

```
    xhr.addEventListener("load", htmlUploadComplete, false);
```

```
    xhr.addEventListener("error", htmlUploadFailed, false);
```

```
    xhr.open('POST', 'https://s3.amazonaws.com/'+ '{!bucketName}', true);
```

```
    xhr.send(fd);
```

```
}
```



```
function htmlUploadComplete(evt)
{
    //Call completeUpload() method
}

function htmlUploadFailed(evt)
{
    //Call cancelUpload() method
}
</script>
```

You can see the appropriate values for the request parameters below (Figure 130).

Form Field	Value
<i>acl</i>	'private'
<i>AWSAccessKeyId</i>	<i>SDriveTools.getAccessKey()</i>
<i>bucket</i>	<i>SDriveTools.getBucketName()</i>
<i>Content-Disposition</i>	'attachment; filename=\"'+ <i>uploadRequestInfos.fileName</i> +\"'
<i>Content-Type</i>	<i>uploadRequestInfos.fileType</i>
<i>key</i>	<i>uploadRequestInfos.fileLocation</i>
<i>policy</i>	<i>uploadRequestInfos.policy</i>
<i>signature</i>	<i>uploadRequestInfos.signature</i>
<i>x-amz-security-token</i>	<i>SDriveTools.getUserToken()</i>
<i>x-amz-server-side-encryption</i>	'AES256'
<i>success_action_status</i>	201

Figure 130



R. 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>