# <u>S</u>DRIVE

# S-Drive Configuration for Salesforce.com Communities v1.24

Important Note

This guide contains information about Salesforce Communities for S-Drive. Refer to the S-Drive Installation Guide, S-Drive Advanced Configuration Guide and S-Drive User Guide for more information about installing/ configuring S-Drive product.







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#### A. Enabling Communities for Your Organization

App Setup	
Customize	
Tab Names and Labels	
▶ Home	
<ul> <li>Activities</li> </ul>	
Chatter	
Communities New!	
Settings	
Figure 1	

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

In the "Communities" page, first check "Enable Communities" checkbox. Then type a unique domain name that will be used in all your communities. Note that this name can't be changed after you save it. Click "Check Availability" button and if "Success" message is shown click "Save" button (Figure 2).

Communities						
Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. Learn more						
To get started with communities, you must first enable it and select a domain.						
Save						
Enable communities						
Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. Learn more 🕼 Enable communities						
Select a domain name						
Important: The domain name will be used in all of your communities and can't be changed after you save it						
Sample Community URLs MyCompany.force.com/customers MyCompany.force.com/developers MyCompany.force.com/partners Domain name cyangate-test -developer-edition.na7.force.com Check Availability Save						

Figure 2





#### B. Creating a New Community

Once you enable Communities for your organization, you can create new communities (Figure 3). You can click "New Community" button to create a new community.

Manage Communities						
Success! You can now create new communities.						
The list shows all communities in your organization. Clicking (	on the Community Name link takes you directly to the Community. If you're not a member, the Community Name is not a link.					
All Communities	New Community					
No Communities						



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

Create Community		×					
* Name	Test Community						
Description	Testing S-Drive features in <u>Salesforce</u> Communities						
URL	URL cyangate-test-developer-edition.na7.force.com / test						
After creating a commun publish it or share the U	After creating a community, you can continue to customize it. It is visible only to administrators until you publish it or share the URL.						
	Create						

Figure 4

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



Figure 5





# C. Configuring S-Drive for Community

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

Test Community: Community Settings						
Let us know what you think   Help 💡						
Kembers	Getting Started	Dismiss				
Tabs	Tabs Tabs Tabs Tabs To set up your community, you need to add members and select the tabs you want to display. To further customize and brand your community, go to Branding, Login Page and Emails					
randing		,				
Login Page	Test Community	Edit Salesforce Communities				
Emails	URL https://cyang edition.na7.f	gate-test-developer- force.com/test				
	Status Preview					
	Publish					
Close						



Click "Tabs" section and select the "S-Drive" tab to display in the Community pages. You can also select S-Drive Attachments containing standard/custom object tabs and click "Save" button (Figure 7).

			Le	t us know what you think   I	lelp 🕜
Select tabs to include in this comr	nunity.				
Standard sharing rules app	ly to all re	cords. Learn	more		
Available Tabs			Selected T	abs	
Accounts Campaigns Console Contacts Contracts Dashboards Data.com Files Groups Home Ideas Leads Libraries	E R	Add emove	ve	Up Down	
		Save Can	cel		





Below is a sample Community screen with Case Files enabled:

Test Community ~							🔲 Community User 🗸 🗸
Test Community						Search	Search
Chatter Cases Test Objects	S-Drive						
Create New	© 00001000						Printable View   Help for this Page 🥹
Recent Items	+ Hide Feed						
00001000	🗭 Post i 📲 File 🖉 New Child C	More *	O Tallana				
Recycle Bin	Write something	Sh	Followers				
	Q   Show All Updates 👻		No followers.				
	There are no updates.						
	« Back to List	Soluti	ions (0)   Open Activities (0)   Emails (0)	Activity History (0)   Case	Comments (0)   Attachments (0)   Case Hist	Ianx 101	
	Case Detail	Ec	dit Close Case Clone				
	Case Owner	Demo CyanGate [Change]			Status	Closed	
	Case Number	00001000 Ress Contribut			Priority Contact Phone	High (612) 767 6000	
	Account Name	Edge Communications			Contact Final	(512) 757-6000	
	Туре	Electrical			Case Origin	Phone	
	Case Reason	Equipment Complexity					
	Date/Time Opened	12/14/2009 1:12 AM			Date/Time Closed	10/26/2008 11:59 AM	
	Product	GC5040			Engineering Req Number	765876	
	Potential Liability	No			SLA Violation	No	
	Created By	Demo CyanGate, 12/14/2009 1:12 AM			Last Modified By	Demo CyanGate, 12/14/2009 1:12 AM	
	Subject	Starting generator after electrical failure					
	Custom Links	Lie cell (Cross cell Capatosity					
		Ecoset Closs-sell Opportunity	dit Close Case Clone				
	Solutions View Suggest	ed Solutions OF	Find Solution				
	No Solutions Attached						
	Case Files	N	lew Folder Upload File(s) Attach	from S-Drive Folders Ema	Il Selected Delete Selected		
	Home					Total	Items: 1 (Search Q)
	C Actions T File Name	*	Created Date	Created By ID Description F	ile Size Case Case File Name Delete	ed Last Modified By ID Last Modified Date Record ID	System Modstamp Private
	E Item Actions - Commun	ity Folder	1/13/2014 5:49 AM	Community Folder 0	bytes 00001000 201401-145	Community User 1/13/2014 5:49 AM a05A00000	ICn6TH 1/13/2014 5:49 AM
							Total Items: 1

Figure 8



# 

### D. Editing Community Profile Permissions

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

Based on the profile of the community user, users can have different permissions in S-Drive.

If you try to access the community with no permissions you'll see "You do not have permissions to access S-Drive data!" error when you click the "S-Drive" tab (Figure 9).

Test Comn	nunity						
Test Community							
Cases	5-Drive						
You do not have permissions to access S-Drive data!							
	Figure 9						

If you just enable "read" feature, community users will just be able to download or email uploaded files by internal users. They won't be able to upload a file, delete a file, create a folder or edit an item's description. Also note that visibility of the files list, buttons and menu items are affected via sharing and S-Drive Configuration.

To set these permissions edit the selected profile using the Administration Setup -> Manage Users -> Profiles menu. Click on the name of the profile you want to edit (Figure 10).

Assigned Profiles	Edit Profiles		Assigned Profiles Help 🕝
Profile		Users	
Portal Manager Clone		3	
8			

Figure 10

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

Profile Portal Manager Clone	p for this Page 🔞							
« Back to List: Users								
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.								
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.								
Ensided Adex Llass Access [11]   Ensided Visuatorce Page Access [b]								
Profile Detail Letit: Clone Delete View Users	Profile Detail Edit Clone Delete View Users							
Name Portal Manager Clone								
User License Customer Portal Manager								



Scroll down to the "**Custom Object Permissions**" section. You'll see the "**Basic Access**" selections for "**S3Objects**" custom object (or if you're working on S-Drive Attachments like Cases, Accounts, custom objects etc. you need to edit the custom object file's permissions). You will need to check/uncheck these boxes based on your needs (Figure 12). Note that you can edit "Custom Object Permissions" for just "Custom Profiles". You may need to *clone* your standard profile to be able to edit a community profile. Refer to the Salesforce.com documentation for more information.





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

	Basic Access	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All i	Modify All		
S3Objects								
Case Files	<b>V</b>							
Figure 12								

You can set access levels for customers using communities. We strongly suggest you to just set the "Read" access to the community users for data security.

#### 1. Example 1: Just Read Permission Enabled

If you just set "Read" and unset other permissions for selected custom object (here S3Object) (Figure 12), your community users won't be able to:

- upload files
- create folders
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders.

They will be able to:

- browse folders
- download files
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "Email" and "Download File(s)" buttons will be displayed (if Download Manager is enabled) for community users and for each file "Download" and "Copy URL" item menu actions will be visible. "Item Actions" menu will be hidden for folders (Figure 13).





			Search	1 Q
Home				
Actions <u>T</u> File Name	Created Date	Created By ID	Description	File Size
Company Invoices	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions - Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Copy URL	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes



#### 2. Example 2: Read, Create and Edit Permissions Enabled

If you set Read, Create, Edit permissions and unset Delete permission for selected custom object (here S3Object) (Figure 14), your community users won't be able to:

- delete files/folders
- cut/copy files.

	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
\$30bjects						
Case Files						

Figure 14

They will be able to:

- upload files
- create folders
- browse folders
- download files
- rename files/folders
- edit descriptions of files/folders
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email" and "Download File(s)" (if Download Manager is enabled) buttons will be displayed for community users and for each file "Download", "Edit", "Rename" and "Copy URL" action menu items will be visible. "Edit" and "Rename" action menu items will be visible for folders (Figure 15). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.





Home	)				Search	n Q)
Actions	I	File Name 🔺	Created Date	Created By ID	Description	File Size
Item Actions -		Company Invoices	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions -	R	Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Download Copy URL Edit		Demo TXT Document.txt	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes
Rename						

Figure 15

#### 3. Example 3: Read, Create, Edit and Delete Permissions Enabled

If you set Read, Create, Edit, Delete permissions for selected custom object (here S3Object) (Figure 16), your community users will be able to:

	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All i	Modify All
\$30bjects	<b>V</b>					
Case Files	V					

Figure 16

- upload files
- create folders
- browse folders
- download files
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders
- email files

9

- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email", "Download File(s)" (if Download Manager is enabled), "Cut", "Copy", "Paste" and "Delete File(s)" buttons will be displayed for community users and for each file "Download", "Edit", "Copy URL", "Rename" and "Delete" item menu actions will be visible. "Edit", "Rename" and "Delete" action menu items will be visible for folders (Figure 17). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

Home	X				Search	Q
Actions	I	File Name A	Created Date	Created By ID	Description	File Size
Item Actions +		Company Involces	4/3/2013 1:40 AM	CyanGate CyanGate	Company Invoices	0 bytes
Item Actions -	X	Demo PDF Document.pdf	4/3/2013 6:43 AM	CyanGate CyanGate		149.09 KB
Download Copy URL Edit	1	Demo TXT Document.txt	4/3/2013 5:15 AM	CyanGate CyanGate		845 bytes
Rename		/				

Figure 17





#### 4. Permission Combinations That Are Not Supported

Permission combinations other than above examples are not supported by S-Drive and we strongly recommend you not to use unsupported permission combinations.

#### 5. Other Issues

If you get an "INVALID FIELD" error message like below while uploading a file after giving required permissions you may need to check the "Field Accessibility" settings for the selected profile under Administration Setup -> Security Controls -> Field Accessibility menu:

Operation Failed
INVALID_FIELD: Select s.Id, s.cg_WIP_c, s.CreatedById, s.CreatedDate ~ ERROR at Row:1:Column:14 No such column 'cg_WIP_c' on entity 'cg_S3Object_c'. If you are attempting to use a custom field, be sure to append the '_c' after the custom field name. Please reference your WSDL or the describe call for the appropriate names. [object Object]
ОК



"Hidden" fields for the selected custom object (here S3Object) needs to be set as "Visible" from this menu.

#### E. S-Drive Support

You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:

- 1. Open a Ticket at Support Site: <a href="mailto:sdriveapp.com/support">sdriveapp.com/support</a>
- 2. Email: <a href="mailto:sdrive@sdriveapp.com">sdrive@sdriveapp.com</a>

You can find up-to-date product information, documents, tutorial videos, tools in our web page: <u>www.sdriveapp.com</u>