

# S-Drive Installation Guide v1.24

Important Note

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



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### **A. Installation**

 Go to S-Drive Website (<u>sdriveapp.com</u>). Click "Get S-Drive" button. S-Drive Product Page will be opened. And click "Get It Now" (Figure 1).



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

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

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

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







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

Overview	Details	Reviews 14	Provider		🖤 Save	<b>€</b>		
	Almost there!							
	WHAT YOU ARE INSTALLING WHERE YOU ARE INSTALLING							
	PACKAGE ORGANIZATION S-Drive Unlimited and Secure, File Storage and							
		Distribution	,	EDITION				
		VERSION SDrive (1.22/	1.22)	USER NAME				
		SUBSCRIPTIO Free	N					
		DURATION Does Not Exp	ire					
		NUMBER OF S	SUBSCRIBERS					
	□ I have read and agree to the terms and conditions .							
		Cancel Install	Back to previous step	Confirm and Install!				
				Figure 4				

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

Package Installation	on Details Help for this Page
Package Name	SDrive
Version Name	1.24
Version Number	1.24
Publisher	CyanGate
Description	S-Drive is an easy, secure and unlimited file storage and distribution platform. No more attachments or FTP, just send a link. Collect your company knowledge securely on Amazon S3 Cloud Storage. Access anywhere, anytime.
	Continue Cancel

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





Appro	ve Third-Party Access		×				
Ø	This package may send or recei websites. Make sure you trust th <u>are unsure?</u>	ve data from third-party ese websites. <u>What if yo</u>	u				
	Website	SSL Encrypted					
	ls.amazonaws.com	<					
	s3.amazonaws.com	<b>✓</b>					
	Yes, grant access to these third-party web sites Continue Cancel						

Figure 6

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

kage Custom Objects Package will have the user's acce:	ss (via the API)	) to all Custom O	bjects in you	r Organization.					
ended Object Permissions	Dead	Create	Eulis	Delete		Deed	Create	Eatla	Delete
Accounts	×	∠.eate	Zun Z	1	Ideas	1	∠.eate	Zant	Jelete
Assets	1	1	1	1	Leads	1	1	1	1
Campaigns	1	1	1	1	Opportunities	1	1	1	1
Cases	1	1	1	1	Price Books	1	1	1	1
Contacts	1	1	1	1	Products	1	1	1	1
Contracts	1	1	1	1	Solutions	1	1	1	1
Documents	1	1	1	1					



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

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

Figure 8

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

Step 2. Install Package	Step 2 of 2
The package is ready to be installed. Click Install to continue.	
	Previous Install Cancel

Figure 9





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

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



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

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



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

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

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



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

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

Figure 13





After completing installation and S-Drive tab configuration, click on the "S-Drive" tab.

Step 1: Configure Remote Sites: If Remote Site Settings are configured correctly (see Figure 6), you'll see "Your remote site settings are configured correctly" message under the "Step 1: Configure Remote Sites" section (Figure 14Error! Reference source not found.). If you see an error message in Step 1, resolve the issue by following the on-screen instructions (Figure 15).

Welcome to S-Drive
CSDRIVE Thank you for installing S-Drive.
Step 1: Configure Remote Sites
Your remote site settings are configured correctly.
Step 2: Configure Amazon S3 Credentials
Access Key 🥥
Configure Amazon S3 Credentials
Step 3: Configure Amazon S3 Bucket Name
You have to complete Step 2.
Step 4: S-Drive Authorization
In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com See "S-Drive Portal Guide" for more information.

Figure 14

· · · · · · · · · · · · · · · · · · ·				
Welcome to S-Drive				
CSDRIVE Thank you for installing S-Drive.				
Step 1: Configure Remote Sites				
You haven't configured your Remote Sites Settings.				
Go to Setup -> Administration Setup -> Security Controls -> Remote Site Settings and add the following three remote sites:				
<ul> <li>https://s.amazonaws.com</li> <li>https://s.amazonaws.com</li> </ul>				
See "Installation Guide" for more information.				
Step 2: Configure Amazon S3 Credentials				
You have to complete Step 1.				
Step 3: Configure Amazon S3 Bucket Name				
You have to complete Step 2.				
Step 4: S-Drive Authorization				
In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com See "S-Drive Portal Guide" for more information.				
El susse d E				

Figure 15

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Step 2: Configure Amazon S3 Credentials: This step is required to connect your Amazon S3 account with S-Drive. You need to type valid "Amazon Secret Key" and "Access Key". After providing keys, click "Configure Amazon S3 Credentials" button (Figure 14). If you see "Amazon S3 Credentials are configured correctly." message under "Step 2: Configure Amazon S3 Credentials" section (Figure 16), you can continue with "Step 3: Configure Amazon S3 Bucket Name".

Welcome to S-Drive
Thank you for installing S-Drive.
Step 1: Configure Remote Sites
Your remote site settings are configured correctly.
Step 2: Configure Amazon S3 Credentials
Access Key 🕑 [1] 5 1 2 3 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
Step 3: Configure Amazon S3 Bucket Name
Use my bucket Create a new bucket
Bucket Name 📀 🗾
Configure Amazon S3 Bucket Name
Step 4: S-Drive Authorization
In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com See "S-Drive Portal Guide" for more information.

Figure 16

3. **Step 3: Configure Amazon S3 Bucket Name:** This is the bucket that will be used to store your files in your Amazon S3 account. Bucket name must be unique and must comply with DNS naming conventions.

You can select "Use my bucket" or "Create a new bucket" option.

If you select "*Create a new bucket*" option (Figure 16), you need to provide a valid bucket name.

If you select **"Use my bucket"** option (Figure 17), you must select one of the bucket names from the list (that is retrieved from your Amazon S3 account).

If you don't have any S3 bucket or you want to use a newly created bucket, you can create a new bucket using this screen. To do this, select "Create a new bucket" option and type the new bucket name.

Click "*Configure Amazon S3 Bucket Name*" button (Figure 16) (Figure 17). If you see "Amazon S3 Bucket Name is configured correctly." message under "Step 3: Configure S3 Bucket Name" section (Figure 18), you can continue with "Step 4: S-Drive Authorization".

	CyanGate
Welcome to S-Drive	
	you for installing S-Drive.
Step 1: Configure Remote Sites	
Your remote site settings are configured correctly.	
Step 2: Configure Amazon S3 Credentia	ls
Amazon \$3 Credentials are configured correctly	
Access Key 2 C C C C	Secret Key 2
House hey Under the set of	
Sten 3: Configure Amazon S3 Bucket Na	
Step 3: Configure Amazon S3 Bucket Na	
Step 3: Configure Amazon S3 Bucket Na	
Step 3: Configure Amazon S3 Bucket Na  Use my bucket Create a new bucket	ame
Step 3: Configure Amazon S3 Bucket Na Use my bucket Create a new bucket Bucket Name	ame
Step 3: Configure Amazon S3 Bucket Na Use my bucket Create a new bucket Bucket Name O	ame Configure Amazon S3 Bucket Name
Step 3: Configure Amazon S3 Bucket Na Use my bucket Create a new bucket Bucket Name O	ame Configure Amazon S3 Bucket Name

Figure 17

Welcome to S-Drive
CSDRIVE Thank you for installing S-Drive.
Step 1: Configure Remote Sites
Your remote site settings are configured correctly.
Step 2: Configure Amazon S3 Credentials
Amazon S3 Credentials are configured correctly.
Step 3: Configure Amazon S3 Bucket Name
Amazon S3 Bucket Name is configured correctly.
Step 4: S-Drive Authorization
In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com See "S-Drive Portal Guide" for more information.
Figure 18

4. **Step 4: S-Drive Authorization:** You need to go to *portal.sdriveapp.com* to complete this step (Figure 18). Go to *portal.sdriveapp.com* and create a free S-Drive account and authorize S-Drive to connect to your organization. For more information about creating free S-Drive account and connecting your organization to S-Drive, please refer to "*S-Drive Portal Guide*" document.



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

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

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

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

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

Figure 19	)
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 Then select Visualforce Page for Override With section and pick related Visualforce page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for Contacts, OpportunityFilePage for Opportunities) from the drop-down box. Click Save button to complete the override (Figure 20).







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

Buttons, L	inks, and Actions		New Action	New Button or Link Default Custom Links	8		Buttons, Links, and Actions Help (?)
Action	Label	Name	Description	Туре	Content Source	lcon	Overridden
Edit	Accounts Tab	Tab			Standard Salesforce.com Page		
Edit   Del	Billing	Billing		Detail Page Link	URL		
Edit	Delete	Delete			Standard Salesforce.com Page		
Edit	Edit	Edit			Standard Salesforce.com Page		
Edit	List	List			Standard Salesforce.com Page		
Edit	New	New			Standard Salesforce.com Page		
Edit	View	View		7	AccountFilePage (Visualforce Page)		



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

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

#### Figure 22





Upgrading to S-Drive 1.24 is not possible. This version is only for new customers. S-Drive 1.25 will be released for migrating and upgrading previous versions.

#### F. S-Drive Advanced Configuration



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

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





- [Problem] I'm getting "Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://ls.amazonaws.com/?......" error.
   [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://ls.amazonaws.com
- [Problem] I'm getting "Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://s3.amazonaws.com/?......" error.
   [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://s3.amazonaws.com
- [Problem] My mail message contains "????" for some language-specific characters in email clients (Outlook, Thunderbird etc.).
   [Solution] Go to Setup -> Personal Setup -> My Personal Information -> Personal Information. Edit User Detail and set Email Encoding to Unicode (UTF-8).
- [Problem] Salesforce sharing is not working.
   [Solution] In version 1.24 sharing is only supported for S-Drive Folders. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.
- 5. [Problem] Percent character (%) is replaced with an underscore character (\_) while downloading.

[Solution] This is a technical limitation.

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

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

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





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: <u>sdrive@sdriveapp.com</u>

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