

# S-DRIVE S-Drive Quick Reference Guide v1.24

## 1. 'S-Drive Folders' Tab

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

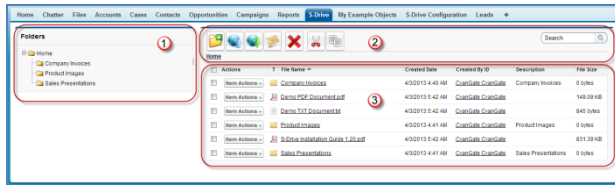


Figure 1

### a. Creating Folders

Click 'New Folder' button (📁) from the toolbar. Type the folder name and then click 'OK' button to create a folder (Figure 2). Folder names cannot be blank, cannot start with a space or a dot and cannot contain '\', '/', ':', '\*', '?', '"', '<', '>', '|' characters.

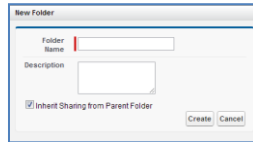


Figure 2

### b. Uploading Files

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

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

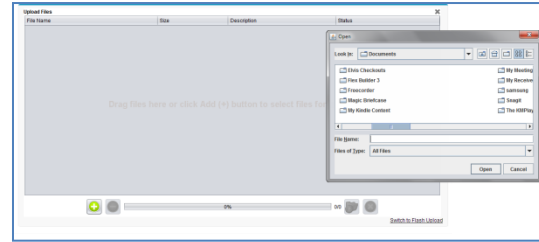


Figure 3

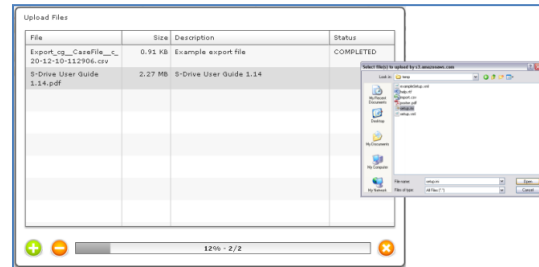


Figure 4

### c. Emailing Files

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

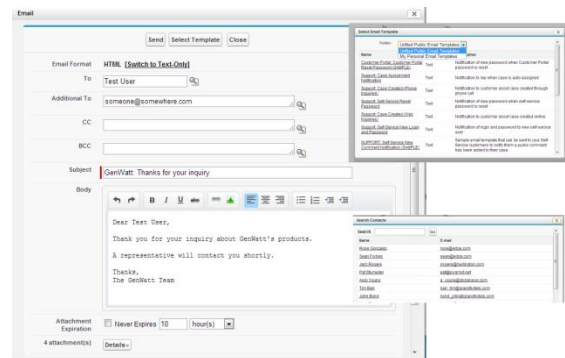


Figure 5

**d. Deleting Files/Folders**

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

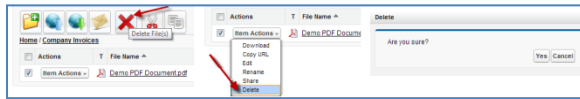


Figure 6

**e. Downloading Files**

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

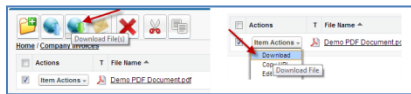


Figure 7

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

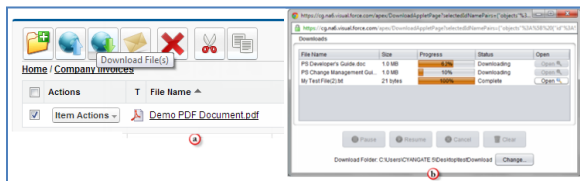


Figure 8

**f. Copying and Moving Files**

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

Select file(s) you want to move and click 'Cut' button (C), browse to the target folder that you want to paste the file(s), and click 'Paste' button (P).

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

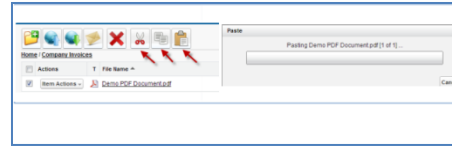


Figure 9

**g. Renaming Files/Folders**

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

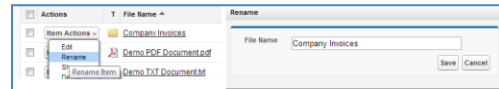


Figure 10

**h. Editing File/Folder Description**

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

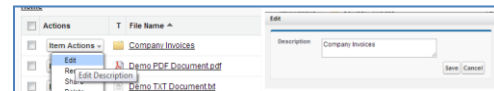


Figure 11

**i. Copying URL to Clipboard**

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

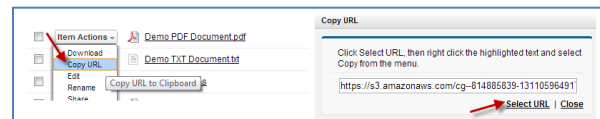


Figure 12

**j. Sharing Files & Folders**

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

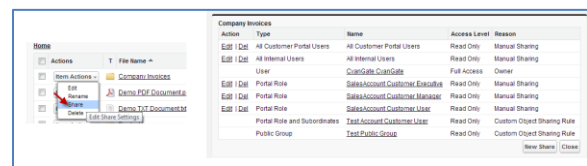


Figure 13

## k. Searching S-Drive Folders

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

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

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

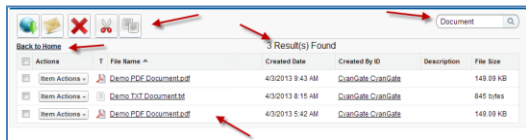


Figure 14

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

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



Figure 15

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

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

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

## 2. 'S-Drive Attachments' Screen

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

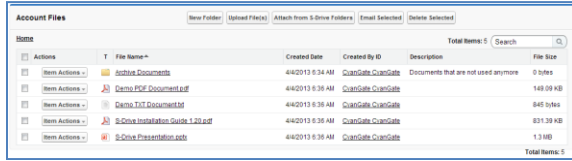


Figure 16

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

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

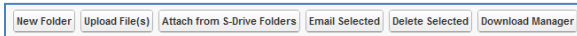


Figure 17

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

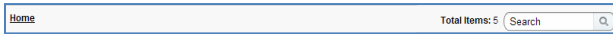


Figure 18

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

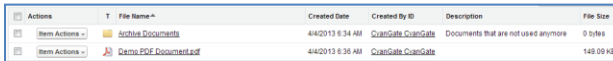


Figure 19

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

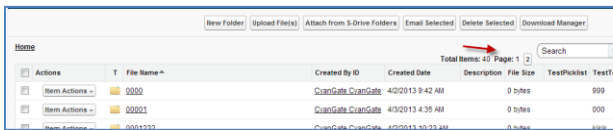


Figure 20

### m. Creating Folders

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

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

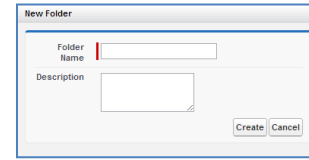


Figure 21

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

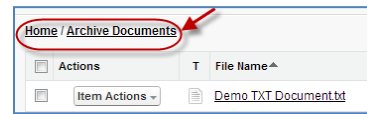


Figure 22

### n. Uploading Attachments

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

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

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

### o. Attaching Files from S-Drive Folders

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

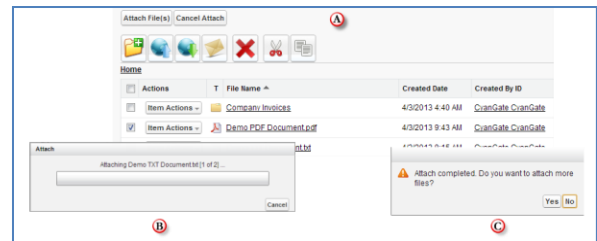


Figure 23

**p. Emailing Selected Attachments**

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

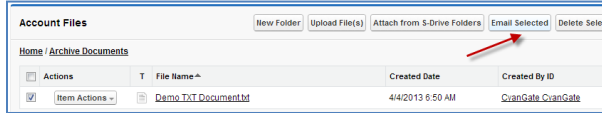


Figure 24

**q. Deleting Selected Attachments**

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

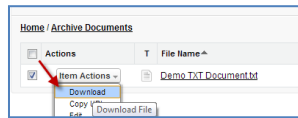


Figure 25

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

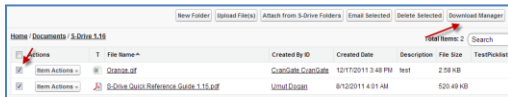


Figure 26

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

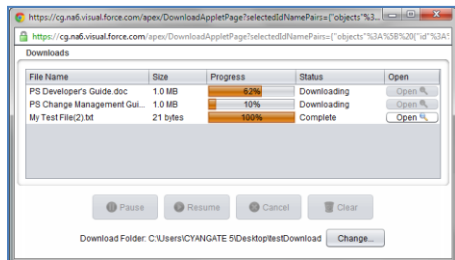


Figure 27

**s. Copying URL of a Selected Attachment**

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

**t. Editing Fields of a Selected Attachment**

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

**u. Searching S-Drive Attachments**

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

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

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

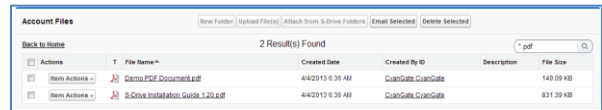


Figure 28