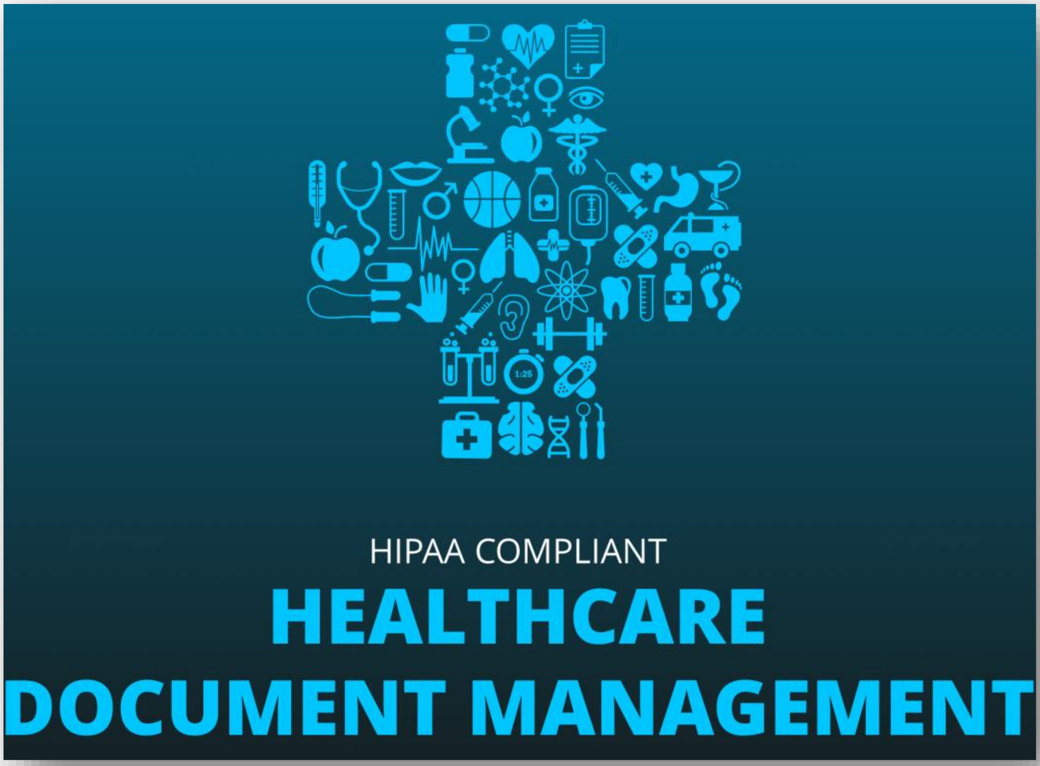


Implementation Guide

v1.0

Important Note

This user guide contains detailed information about S-Drive for Salesforce Lightning 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 the *S-Drive Quick Reference Guide* for quick reference.

CyanGate

www.cyangate.com

Contents

A. Lightning Bolt Solutions

Salesforce Lightning Bolts are Industry solution templates built by an ecosystem of Salesforce partners, helping you get to market faster. Lightning Bolts contain industry process flows, Apps, Lightning Components, and Communities, all integrated seamlessly with the Salesforce platform and CRM. CyanGate's HIPAA Compliant Healthcare Document Management Lightning Bolt Solution is to complement the implementation of Salesforce Health Cloud.

B. Installation

CyanGate's HIPAA Compliant Healthcare Document Management Lightning Bolt Solution can be installed from the AppExchange site:
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FvMxUUAV

Click on Get It Now button to install the bolt. Once installed, the lightning bolt comes with 14 custom objects and 7 tabs to fully support implementation of Health Cloud.

In order to assure optimum performance, Salesforce AppExchange app, S-Drive should be installed for optimum performance. Please visit S-Drive from the AppExchange site:
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001SWUTEA4

C. S-Drive Folders Screen

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

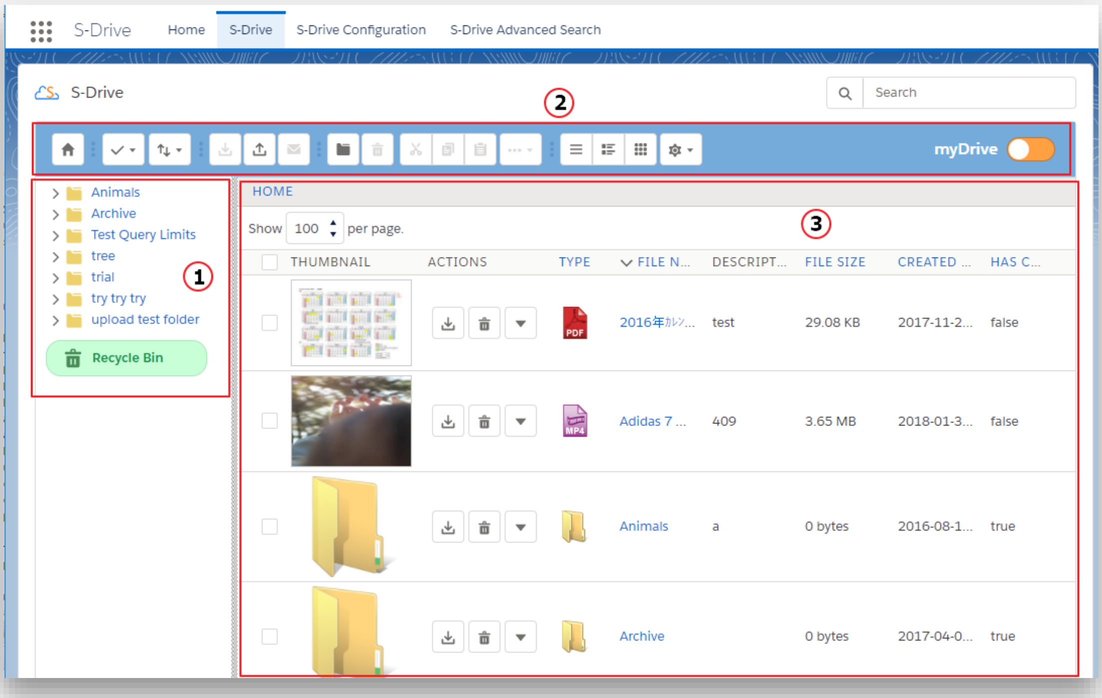


Figure 1

1. S-Drive 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 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 show its contents on the panel when clicked.

2. Toolbar

Top panel (Figure 1-2) is the **"Toolbar"** panel. It displays breadcrumb navigation for folders, search box, action buttons and view type buttons.

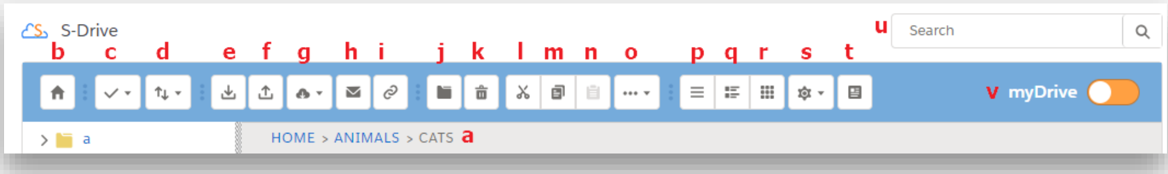


Figure 2

(a) "Breadcrumb Folder Navigation" keeps the current folder information. For example, if you are under *"Home/Animals/Cats"* folder, the location information will be displayed in this area (Figure 2-a). You can click any level to drill down to that subfolder.

(b) "Home" button is functioning same as "Home" link on breadcrumb navigation. It directs to root folder of S-Drive Folders.

(c) "Select All -Dropdown" button is used to *Select All* or *Deselect All* items in the list.

(d) "Sort -Dropdown" button is used to sort File List below. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(e) "Download File(s)" button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder selected, it creates a zip file and download it.

(f) "Upload File(s)" button is used to upload file(s). See "Uploading Files" section for more information (Figure 2-f). This item is not displayed for the "Search Results View".

(g) "Import External File(s)" button is used to import files to S-Drive from external sources such as Google Drive, Box, etc. See "Importing External Files" section for more information.

(h) "Email Files" button is used to email files. See "Emailing Files" section for more information (Figure 2-g).

(i) "Share Files With Public Link" button is for creating public links for downloading or giving access. See "Sharing Files with Public Link" section for more information.

(j) "Create New Folder" button is used to create folders. See "Creating Folders" section for more information (Figure 2-h). This item is not displayed for the "Search Results View".

(k) "Delete Selected File(s)" button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 2-i).

(l) "Cut" button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 2-j).

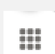
(m) "Copy" button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 2-k).

(n) "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 2-l). This item is not displayed for the "Search Results View".

(o) “Custom Actions” button is used to perform custom actions. See “Custom Actions” section in “S-Drive Advanced Configuration Guide” for more information.

(p)  It changes current view to **List** view. For more information, you can look at **View Types** section.

(q)  It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(r)  It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(s)  By **“Settings”** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

a. “Save View Type as Default”: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. “**Save Sort Field as Default**”: If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **“Hide Breadcrumbs”**: If this item is selected, breadcrumbs (Figure 3-a) will not be shown in the panel.

d. **“Hide Folders Tree View”:** If this item is selected, left panel shown in Figure 1-1 will not be shown.

(t) **“Fields”** button is used to change the shown fields in the files section. See “Changing Displayed Fields” section for more information.

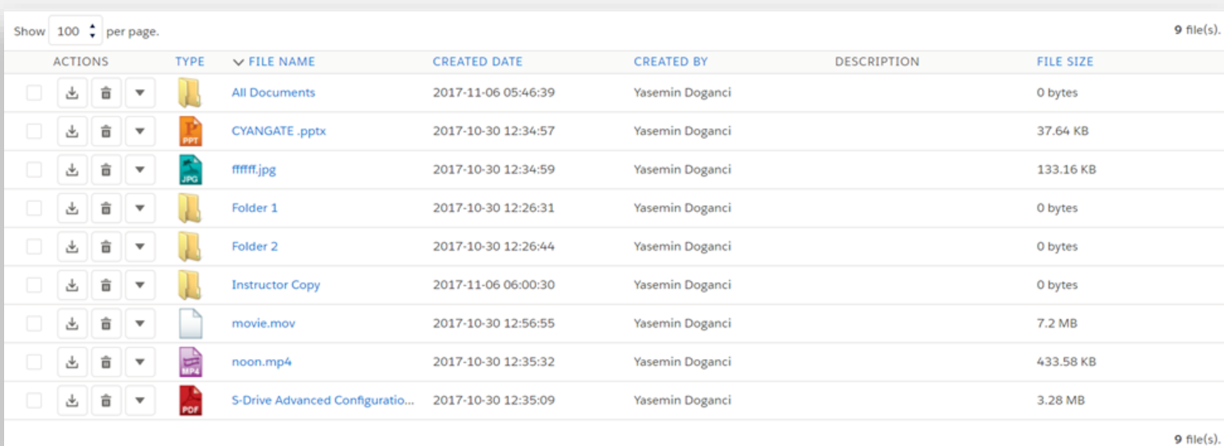
(u) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 2-q).

(v) **“myDrive”** toggle button is used to navigate to myDrive folders. See “myDrive” section for more information.

D. View Types

A. List View

List view is default S-Drive view for all users. There is no any thumbnail or preview image for this view type. The files are listed in a regular order in this view type (Figure 3).



Show 100 per page. 9 file(s).

ACTIONS	TYPE	FILE NAME	CREATED DATE	CREATED BY	DESCRIPTION	FILE SIZE
		All Documents	2017-11-06 05:46:39	Yasemin Doganci		0 bytes
	PPT	CYANGATE .pptx	2017-10-30 12:34:57	Yasemin Doganci		37.64 KB
	JPG	ffffff.jpg	2017-10-30 12:34:59	Yasemin Doganci		133.16 KB
		Folder 1	2017-10-30 12:26:31	Yasemin Doganci		0 bytes
		Folder 2	2017-10-30 12:26:44	Yasemin Doganci		0 bytes
		Instructor Copy	2017-11-06 06:00:30	Yasemin Doganci		0 bytes
		movie.mov	2017-10-30 12:56:55	Yasemin Doganci		7.2 MB
	MP4	noon.mp4	2017-10-30 12:35:32	Yasemin Doganci		433.58 KB
	PDF	S-Drive Advanced Configuratio...	2017-10-30 12:35:09	Yasemin Doganci		3.28 MB

9 file(s).

Figure 3

(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.

(2) **"Actions"** column is used to display action buttons. Based on the sharing settings, you can see **"Item Actions Menu"** by down arrow button inside the Actions column. There are two quick buttons for constantly used actions: **Download** & **Delete**. Once you click the arrow button, you'll see a dropdown menu under the button. Let's review the details about these item actions.

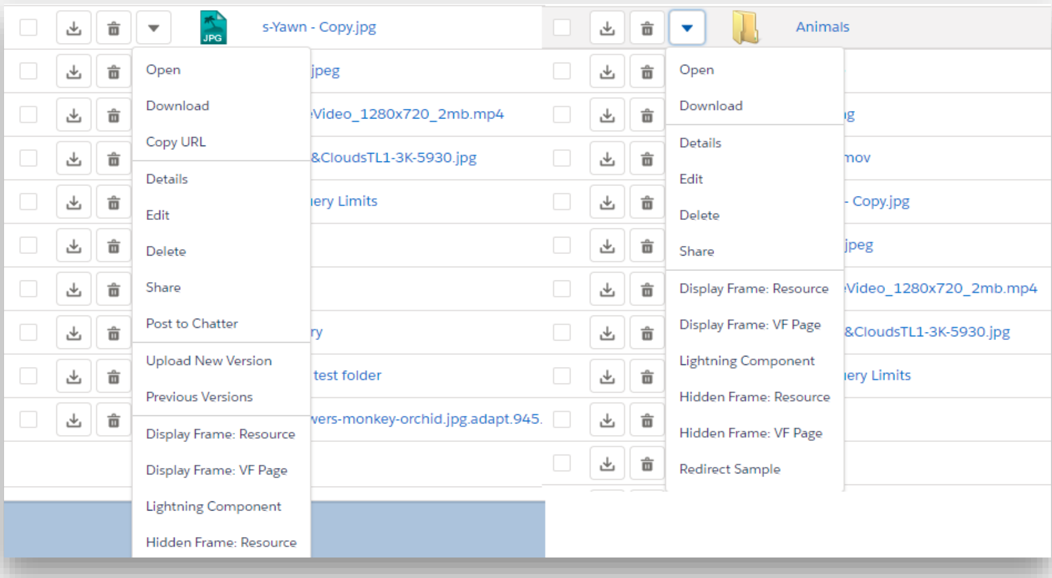


Figure 4

(a) **Open**: It opens files that browsers support to view. If browser cannot open, it will be downloaded.

(b) **Download**: You can download the selected file by selecting this action menu item. If you start download action for a folder, it creates a zip file then download it. See "Downloading Files" section for more information.

(c) **Copy URL**: This option is displayed only for files. You can copy the file download URL to the clipboard. See "Copying URL to Clipboard" section for more information.

(d) **Details:** For a file or folder when you click Details action, A modal window opened with file thumbnail and all information about file or folder. For more information, see Details Window.

(e) **Edit**: This option is displayed for both files and folders. You can edit file/folder description by clicking this action menu item. See "Editing File/Folder Description" 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. See "Deleting Files" and "Deleting Folders" sections for more information.

(g) Share: This option is displayed for both files and folders. You can share file/folder by clicking this action menu item. See "Sharing Files & Folders" section for more information.

(h) Post to Chatter: This option is displayed only for files. You can post your thoughts related to this file by clicking on this action menu item. See "Posting to Chatter" section for more information.

(i) Upload New Version: If versioning is enabled version actions are shown on menu. By this action, you can upload versions of a file.

(j) Previous Versions: By this action, Versioning List page is opened, and all versions are listed. For more information please see "Uploading New Version of a File" and "Previous Versions of File" sections.

(k) Custom Actions: You will see the custom actions that is built by your admin or developer in this section. Clicking on one of these actions will perform the custom action. See "Custom Actions" section in "S-Drive Advanced Configuration Guide" for more information or contact your admin if you have questions on the custom actions that is built for your organization.

(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 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 3).

(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 3).

(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 3).

(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 3).

(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 3).

B. Thumbnail View

On thumbnail view, addition to List View there is thumbnail image of the document. Thumbnail view is active only for users who enabled Preview & Thumbnail feature.

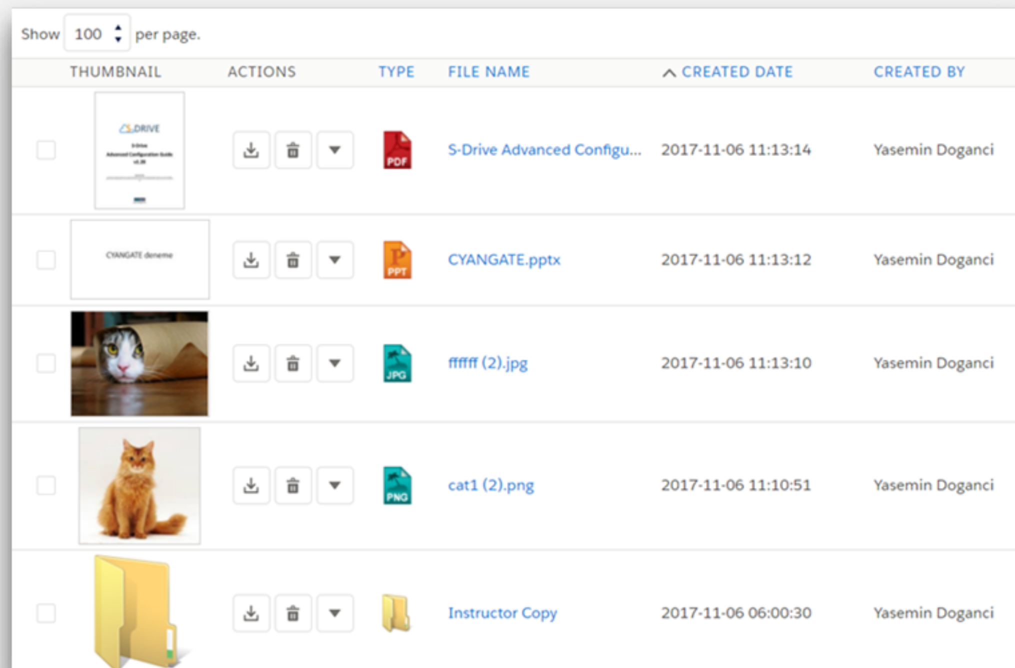


Figure 5

C. Grid View

On Grid view, each item is listed on grid-card style with same height (Figure 7**)**. To select grid view, Preview & Thumbnail feature should be enabled. In the Grid view, action buttons, menu & selection checkbox are different (Figure 8):

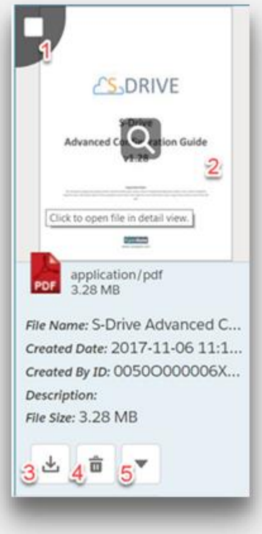


Figure 6

1) **Selection Checkbox:** When mouse hovers over thumbnail image, a checkbox is shown on the top-left side. You can select or deselect item by using this checkbox. (Figure 6-1).

2) **Detail Window:** When hovering thumbnail image there is a glass icon on the center. If you click on image Detail Window is opened. To see more information please check Detail Window section. (Figure 6-2).

3) **Download Button:** You can download file or folder by using this button. (Figure 6-3).

4) **Delete Button:** It deletes file or folder. To see more information, you can see Delete section. (Figure 6-4).

5) **Action Menu Button:** You can access all actions about file or folder to click this down arrow button (Figure 6-5). To get detail information on actions menu please check List View \ Actions section.

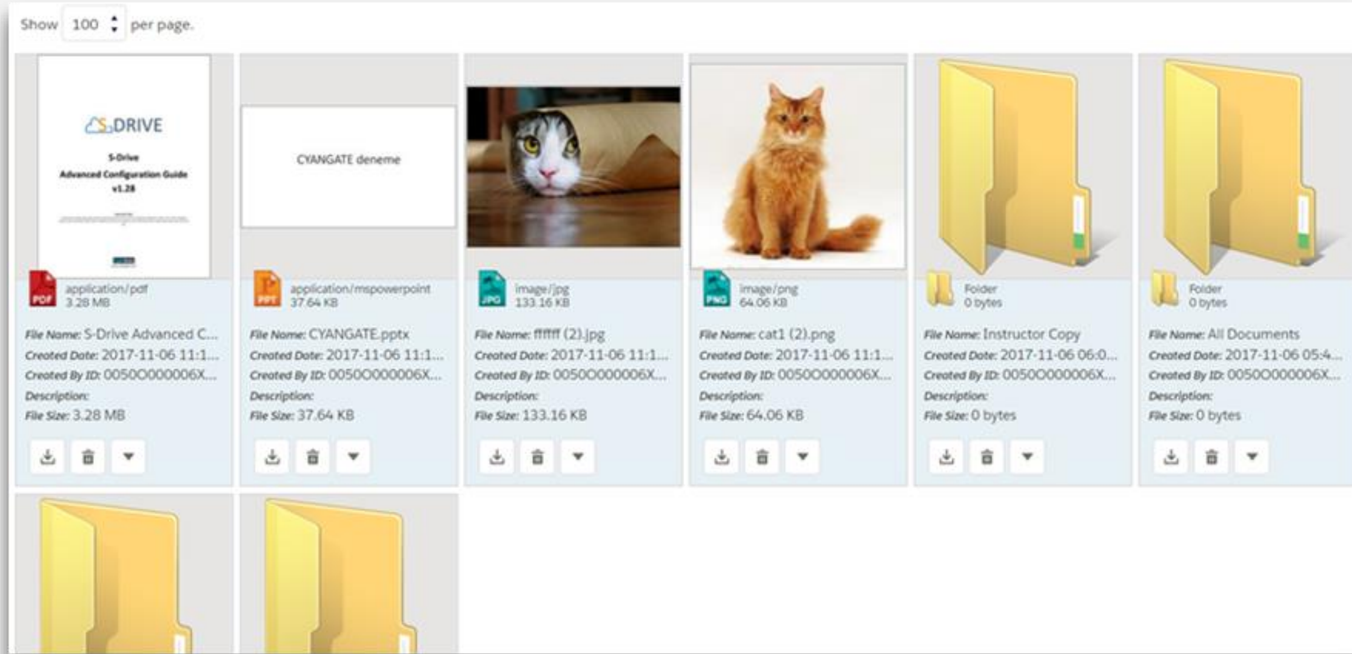


Figure 7

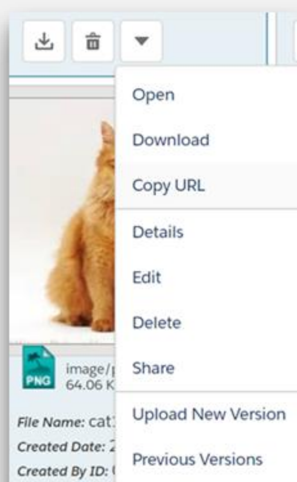


Figure 8

1. Preview Details Window

On Thumbnail, Grid and Card views when clicking thumbnail image of file, or on Action Menu clicking "Details" item, Detail View shows up. In the Detail page there are different tabs to navigate, to view different kind of information about the file. These three tabs are "Detail", "Chatter" and "Audit".

The **Detail** view consist of three main parts: Preview image of file if it exists, File properties & custom fields and Action buttons. To get detailed information on actions menu please check **List View \ Actions** section.

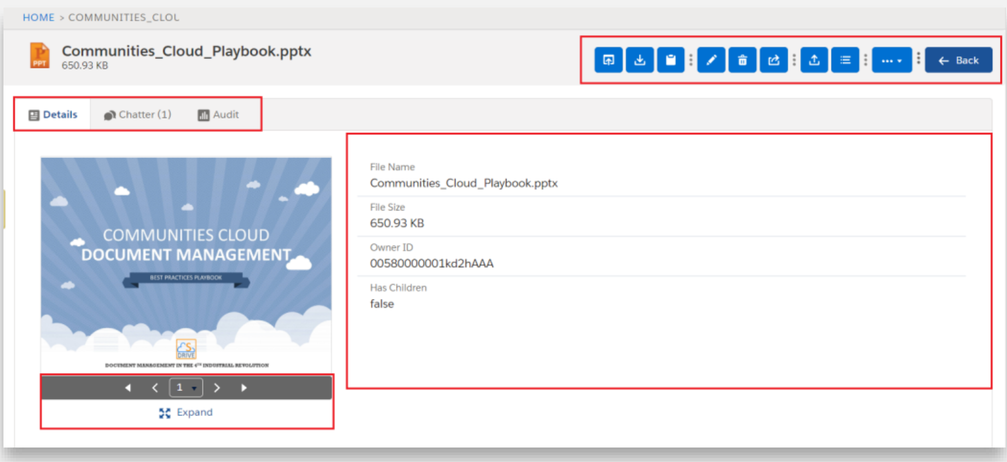


Figure 9

If your file has multiple pages, the previews of these pages are also displayable in this section. Using the buttons under the preview of the file, it is possible to navigate through all the pages.

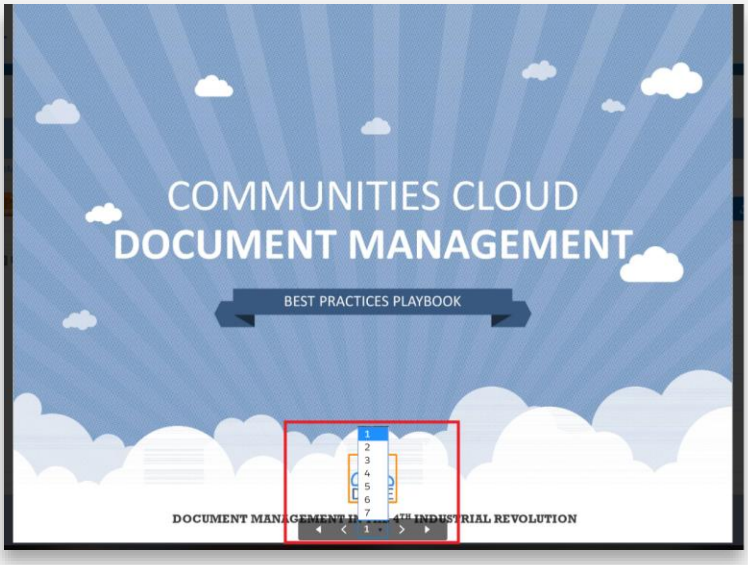


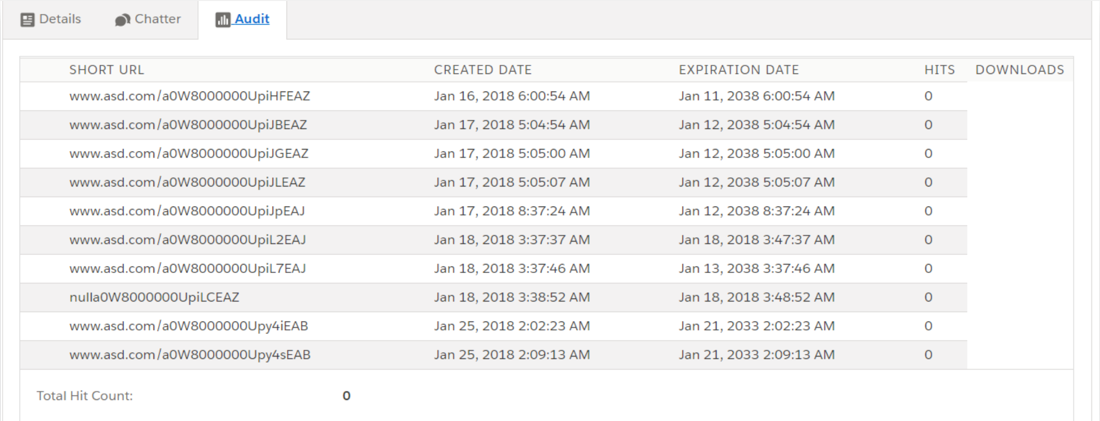
Figure 10

You can also expand the preview and go to a specific page of the file.

The **Chatter** view consist of two parts: the publisher and the feed. To get detailed information on Chatter please check **Chatter** section. The number of feed items can be seen next to Chatter tab (1).

Figure 11

The **Audit** view consist of information about the URL of the file, the created and expiration date, and hit and download counts.



SHORT URL	CREATED DATE	EXPIRATION DATE	HITS	DOWNLOADS
www.asd.com/a0W8000000UpiHFEAZ	Jan 16, 2018 6:00:54 AM	Jan 11, 2038 6:00:54 AM	0	
www.asd.com/a0W8000000UpiJBEAZ	Jan 17, 2018 5:04:54 AM	Jan 12, 2038 5:04:54 AM	0	
www.asd.com/a0W8000000UpiJGEAZ	Jan 17, 2018 5:05:00 AM	Jan 12, 2038 5:05:00 AM	0	
www.asd.com/a0W8000000UpiJLEAZ	Jan 17, 2018 5:05:07 AM	Jan 12, 2038 5:05:07 AM	0	
www.asd.com/a0W8000000UpiJpEAJ	Jan 17, 2018 8:37:24 AM	Jan 12, 2038 8:37:24 AM	0	
www.asd.com/a0W8000000UpiL2EAJ	Jan 18, 2018 3:37:37 AM	Jan 18, 2018 3:47:37 AM	0	
www.asd.com/a0W8000000UpiL7EAJ	Jan 18, 2018 3:37:46 AM	Jan 13, 2038 3:37:46 AM	0	
nulla0W8000000UpiLCEAZ	Jan 18, 2018 3:38:52 AM	Jan 18, 2018 3:48:52 AM	0	
www.asd.com/a0W8000000Upy4iEAB	Jan 25, 2018 2:02:23 AM	Jan 21, 2033 2:02:23 AM	0	
www.asd.com/a0W8000000Upy4sEAB	Jan 25, 2018 2:09:13 AM	Jan 21, 2033 2:09:13 AM	0	

Total Hit Count: 0

Figure 12

E. Creating Folders

You can create folders by clicking "Create New Folder" button in the toolbar (Figure 2-h). 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 New Folder" button. After clicking the "Create New Folder" button, a new pop-up screen will be opened (Figure 13):

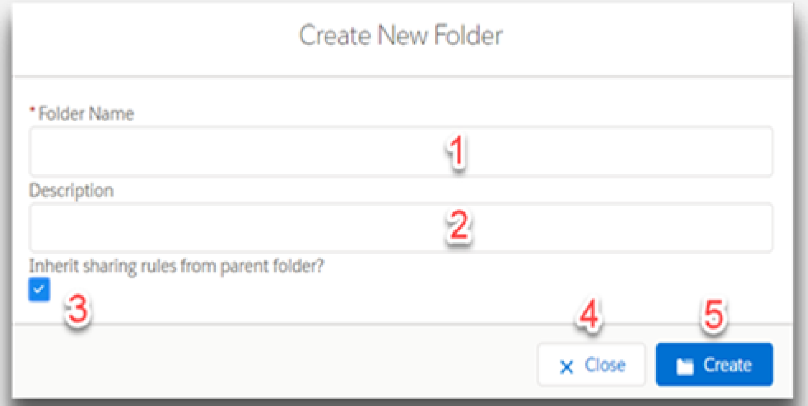


Figure 13

(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 13-1).

(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 13-2).

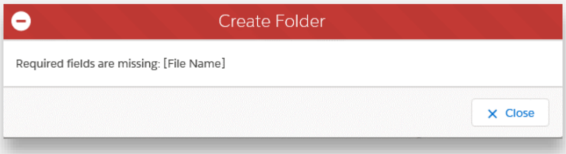
(3) "Inherit Sharing from Parent Folder": If you're creating a folder in a subfolder and you have sharing enabled, you can inherit sharing from parent folder. Inheriting sharing from parent folder means all manual shares that are defined on parent folder will be applied to newly created folder (Figure 13-3). 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) "Close Button": If you decide not to create a folder, you can click on Close button. Operation will be canceled, and you'll return to the S-Drive Folders screen (Figure 13-4).

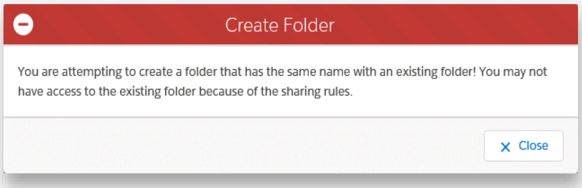
(5) "Create Button": After filling in the required fields, you can click on Create button to create the new folder. S-Drive will create the new folder and refresh the folder structure for you (Figure 13-5).

Notes

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:



- 'Required fields are missing [File Name]'.
- You are attempting to create a folder that has the same name with an existing folder! You may not have access to the existing folder because of sharing rules.'.



Click OK and then specify a new name to the folder.

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 "**Home**" button and go to the folder where you want to create the subfolder.

F. Uploading Files

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 2-e). 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, a new pop-up screen will be opened as shown in Figure 14.

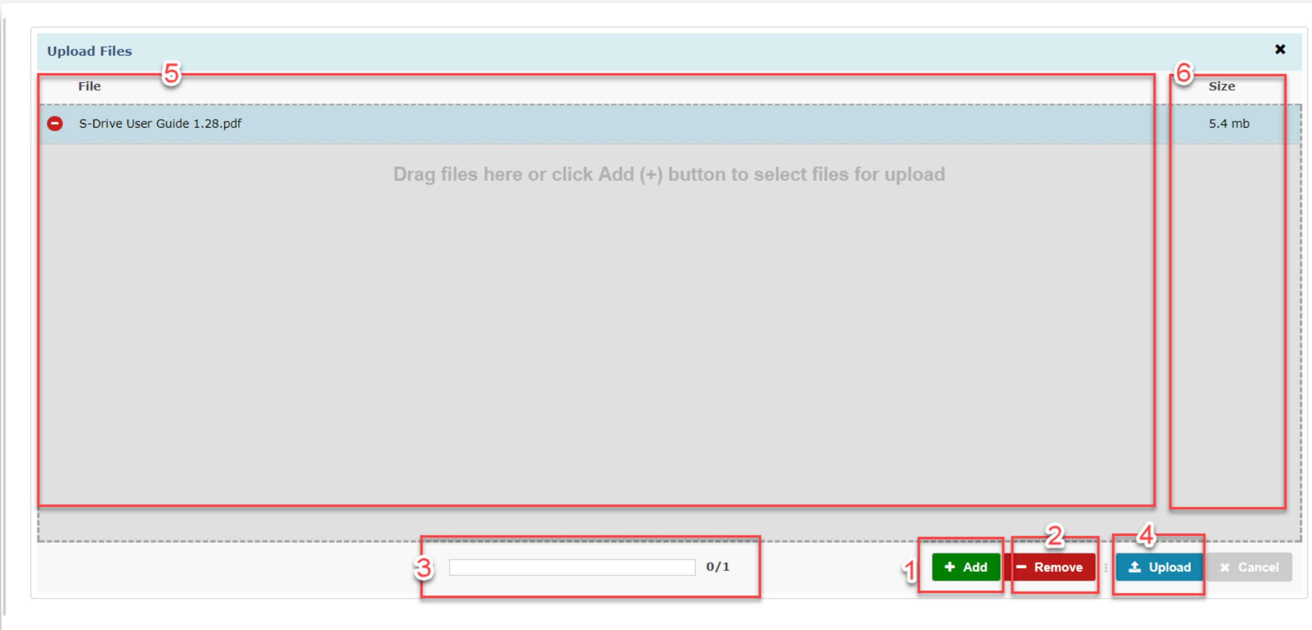


Figure 14

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

(3) "Upload Progress Bar": This progress bar displays the upload information after clicking the "Upload file(s) Button". For Html Upload Widget, percentage of the progress (i.e. 49%) and the uploaded files count of total files count (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.

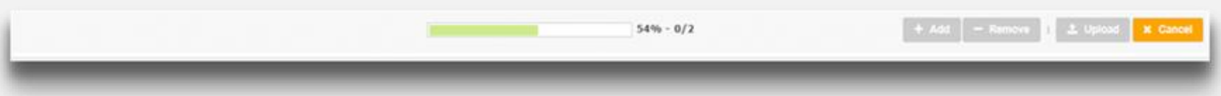


Figure 15

(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.

(5) "File Column": This column displays the names of the files to be uploaded. (Figure 14-5)

(6) "Size Column": This column displays the sizes of the files to be uploaded. (Figure 14-6)

Notes

1. Html Upload Widget also supports custom object fields to edit these fields' values before uploading.

1. **"Status Column"**: This column displays the status of the files which are being uploaded. For HTML Upload, there are five possible scenarios: ***Queued***, ***Uploading***, ***Multipart Processing***,

Done and ***Failed.***

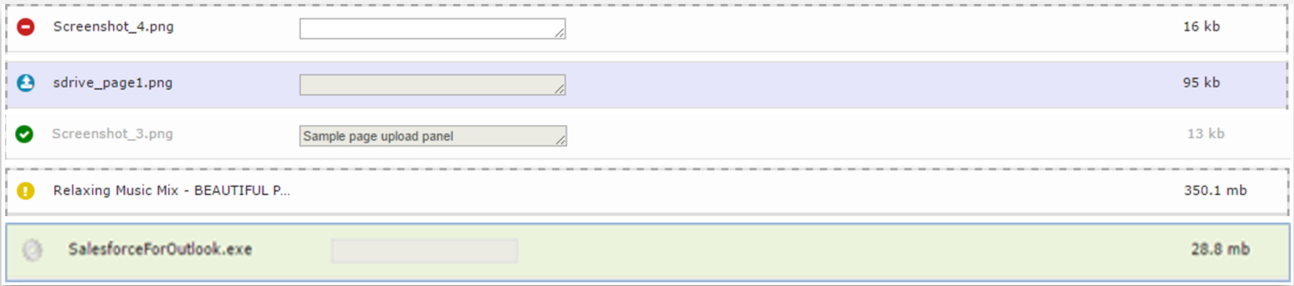


Figure 16

- ***Queued***: Current file in the list is queued for upload. User can remove this file clicking this delete button.
- ***Uploading***: current file in the list is being uploaded to the S-Drive.
- ***Multipart Processing***: current file in the list is processing for multipart operations like copy part, complete multi part. This may take long time.
- ***Done***: current file in the list is successfully uploaded to the S-Drive.
- ***Failed***: current file is failed to upload. This may happen because of a system problem or user canceled the upload operation or also if you select "No" for the "Overwrite file?" question.

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

2. **"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.

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 four possible answers: *Yes, No, Yes to All and No to All* (Figure 17). 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.

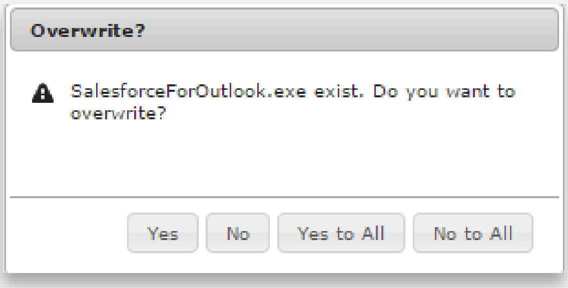


Figure 17

- 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 18). Click OK and select another file to upload.

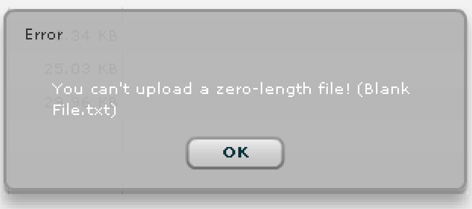


Figure 18

3. After processing the upload list, you'll be informed by saying *"Upload(s) completed successfully"* if list is processed without any errors (Figure 19). After clicking OK button, upload screen will be closed, and the current folder will be refreshed.

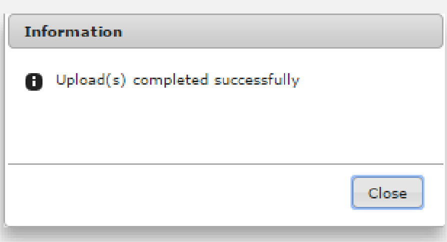


Figure 19

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 "**Home**" button and go to the folder where you want to upload file(s).

G. Importing External Files

SDrive supports importing the files which are stored in Google Drive, Box, One Drive, or SharePoint. By using the Files Connect feature of Salesforce, our system is now integrated to the given systems for file navigation and important.

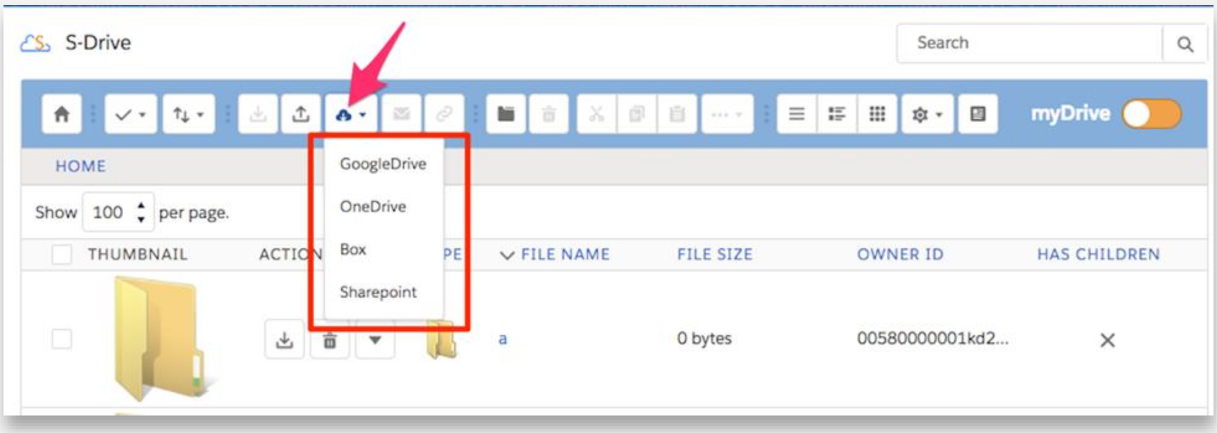


Figure 20

You can find "Import External Files" button on the toolbar. And when the button is clicked, it shows all possible external storage platforms which S-Drive has integration to. So, when any of them is selected, it shows a new modal for user to input external data object name, which is set by admin who set Files Connect configuration for external drive. Check S-Drive Advanced Configuration Guide for information about configuring External Data Objects.

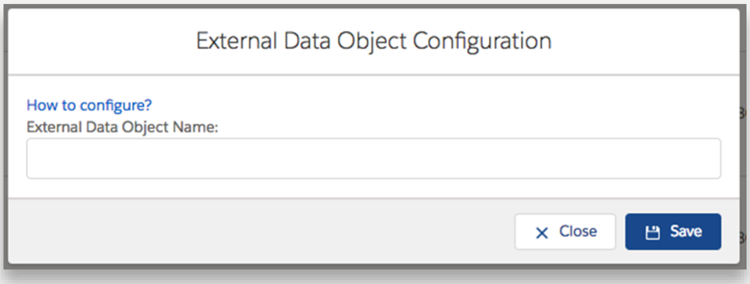


Figure 21

After putting down the external data object name and click save, your external storage platform is ready for navigation and importing files.

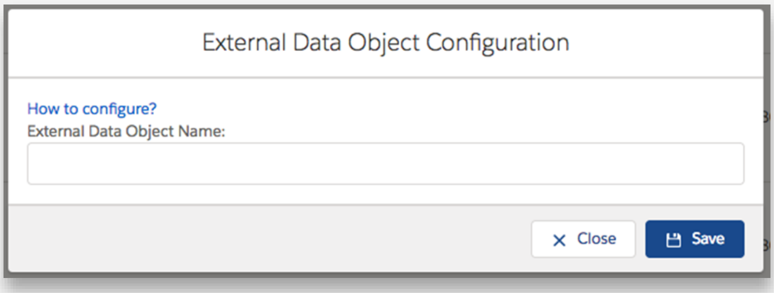


Figure 22

You can select the files or navigate within the folders and select the files which you want to import to S-Drive platform. And when files are selected and “Import External Files” clicked, the selected ones are queued for transfer to S-Drive as given in the figure(d).

(a)”Import External Files” Used for importing the selected files from external storage to S-Drive. It copies the files to the S-Drive folder root on which user previously clicked the import button on the toolbar.

(b)”Go Back” Used for returning to S-Drive File list component.

H. 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

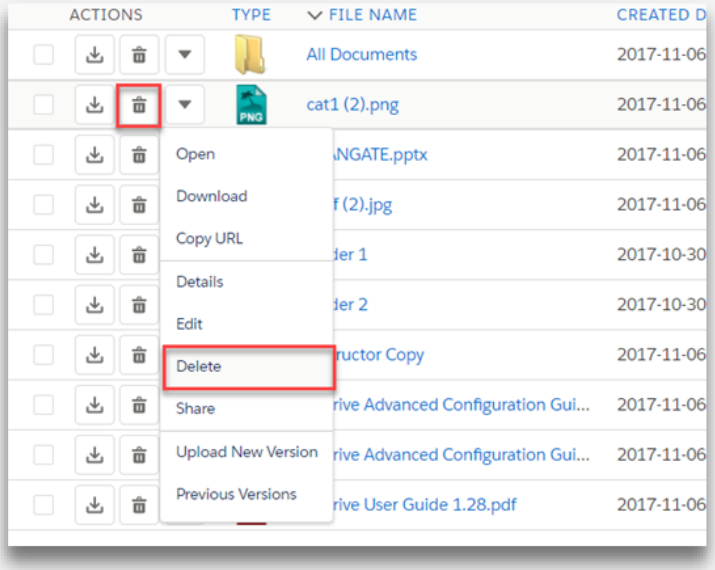


Figure 23

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 23). Using this method, you can delete files one by one. The files you chose to delete will immediately go to the Recycle Bin. In Recycle Bin you can choose to delete the files permanently or restore them. You can access recycled files/folders by clicking on the “Recycle Bin” button which is at the bottom of the Folder’s Tree.

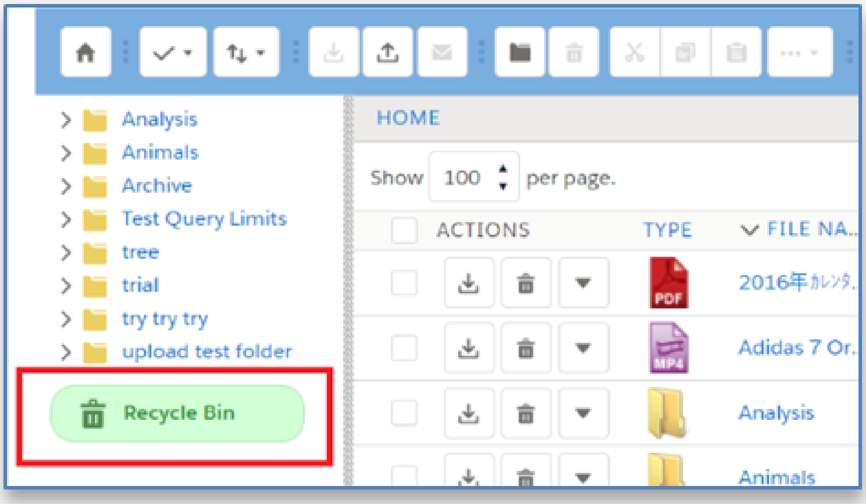


Figure 24

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 25).

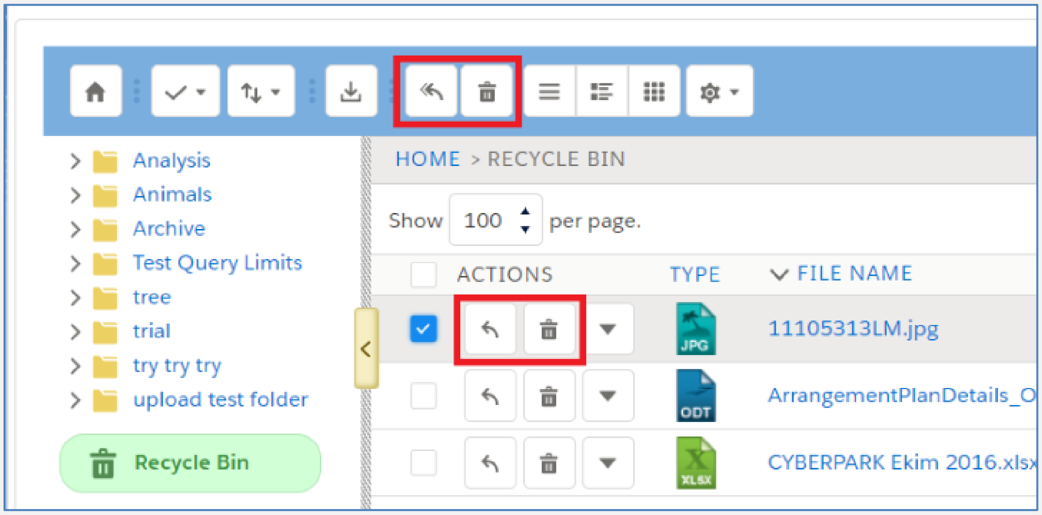


Figure 25

When you recover files/folders they will be sent back to where they were located before deletion.

If you decide to delete the files, you can click on the “Delete File” item action or the “Delete” button on the Toolbar. After clicking the "Delete File" item action menu you'll be asked if you are sure (Figure 26).

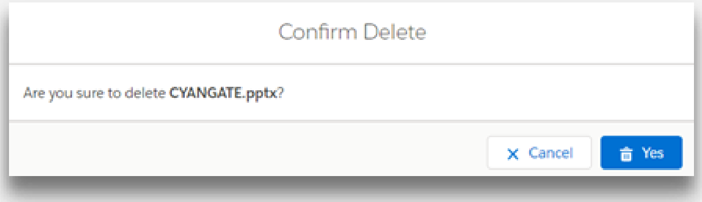


Figure 26

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

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

2. Multiple File Deletion

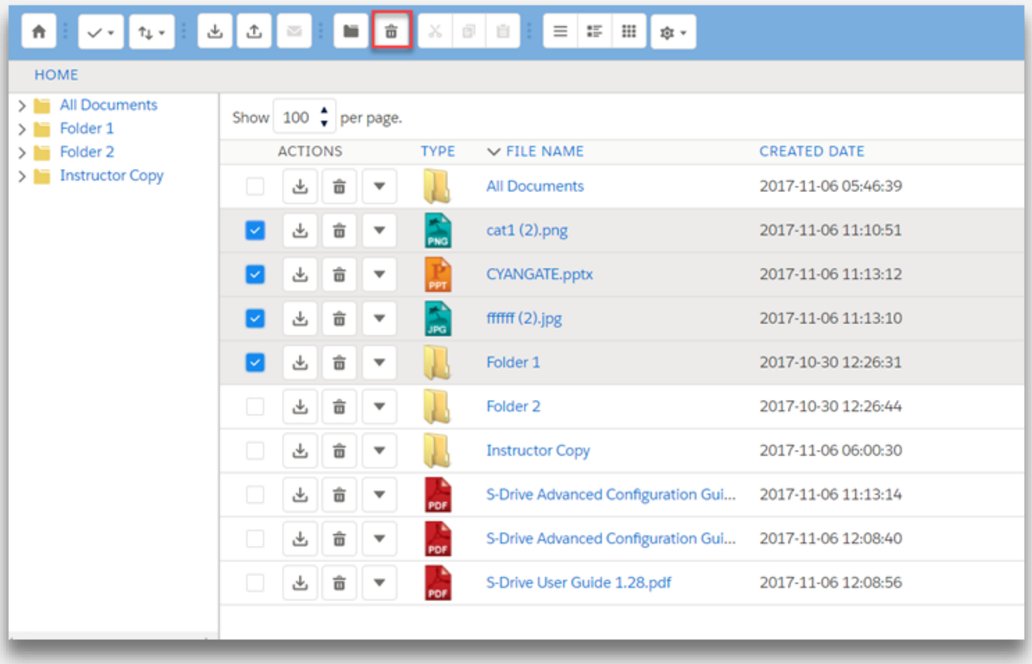


Figure 27

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 27). The files you have chosen to delete will immediately go to the Recycle Bin. In Recycle Bin you can choose to delete the files permanently or restore them. You can access recycled files/folders by clicking on the “Recycle Bin” button which is at the bottom of the Folder’s Tree.

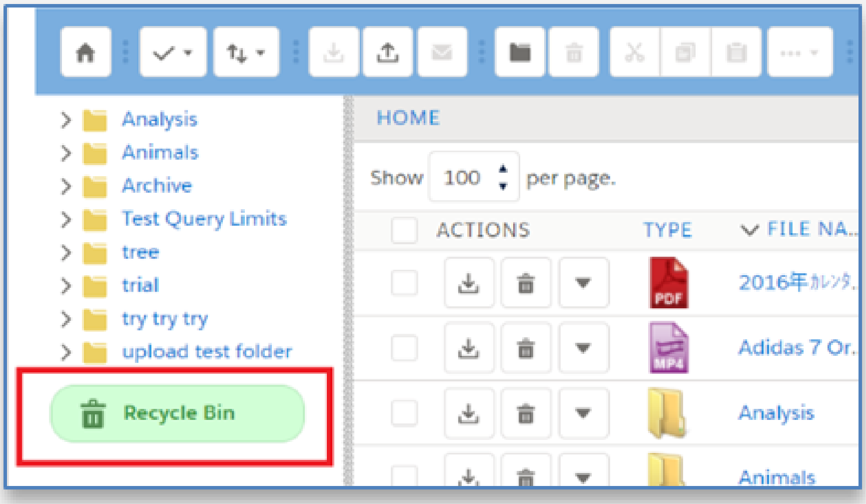


Figure 28

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 29).

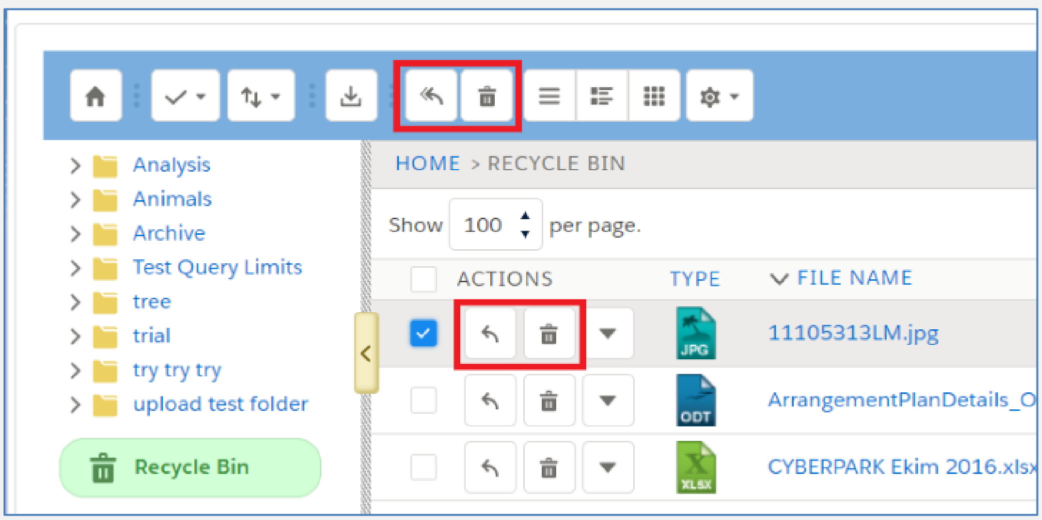


Figure 29

When you recover files/folders they will be sent back to where they were located before deletion.

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. Select "Yes" to delete selected files, "Cancel" to cancel delete operation.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

I. Deleting Folders

You can delete folders using the same approach mentioned in the "Deleting Files" section. However, there are some limitations for the folders. When you try to delete a folder, the delete request should not exceed the maximum CPU time on the Salesforce servers. If you cannot delete the folder because of this issue, you need to select a smaller set of folders, to be able to continue with delete process.

Notes

1. 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 30) 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.

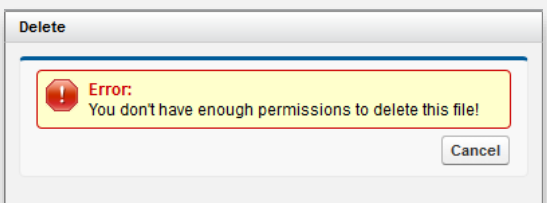


Figure 30

Notes on File Recovery

Please consider these situations when you delete / recover files and folders.

1. If you want to delete a file or folder permanently, first you must delete them from the S-Drive folders, and then delete them from the Recycle Bin.
2. If you delete a sub-folder and then delete the folder it was placed, both folders will be displayed in the Recycle Bin. When you try to recover the sub-folder, it will be sent to the main file, and still be in recycle bin. In order to recover any sub-folders or files, you should recover the main folder they are in.

3. If you send some files to Recycle Bin in Lightning Experience, the files won’t be deleted in Classic.

J. 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 31). 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.

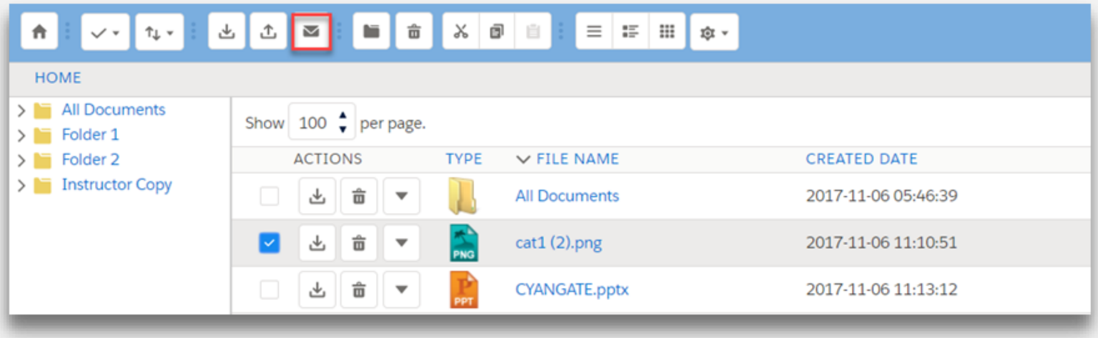


Figure 31

Email Files screen contains many features (Figure 32). Let's review the details of the fields in this screen:

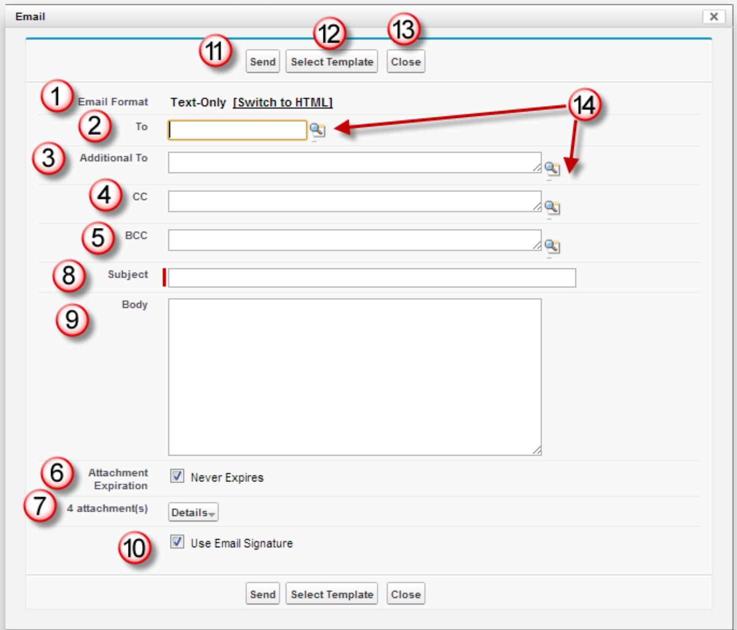


Figure 32

(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 32-1).

(2) "To...": The main recipient of the email (Figure 32-2). 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 32-14) 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 33). 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.

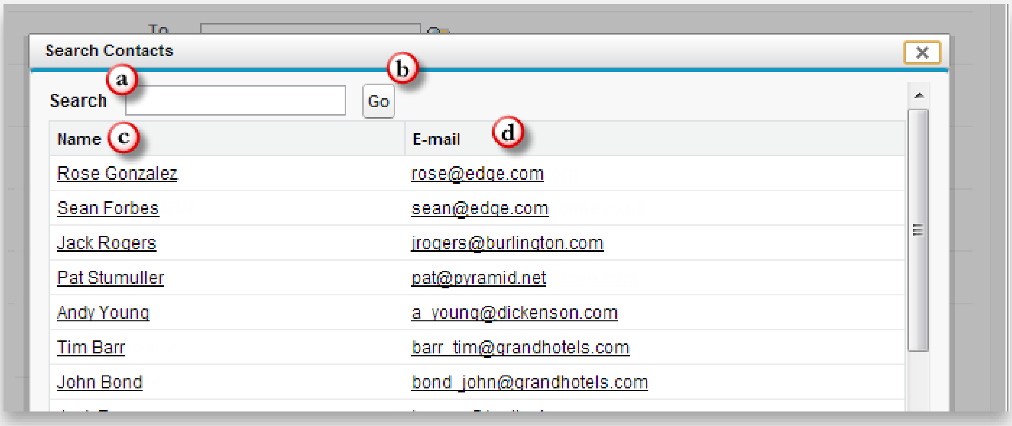


Figure 33

***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 33-a).

(b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 33-b).

(c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 33-c).

(d) **"Email Column"**: Results' emails will be displayed in this column (Figure 33-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 32-14) to select recipients from Salesforce contacts (Figure 32-3). "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 32-14) to select recipients from Salesforce contacts (Figure 32-4). "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 32-14) to select recipients from Salesforce contacts (Figure 32-5). "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 32-6). 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 34). 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.

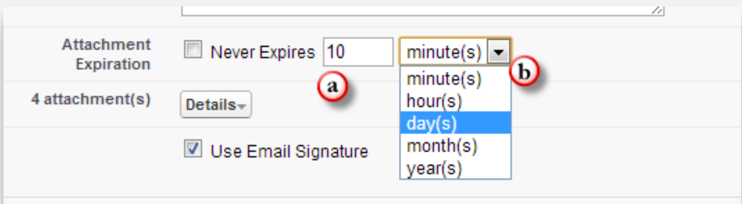


Figure 34

(a) "Number Field": Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 34-a). For this field, only 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 34-b).

(7) "Attachment Details": This section gives information about attached files (Figure 32-7). 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 35).

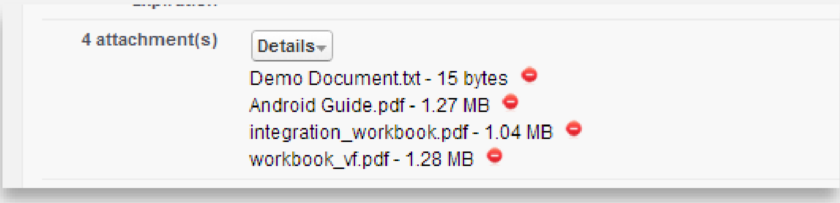


Figure 35

(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 32-8).

(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 32-9).

(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 32-10). "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 32-11). 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 36).

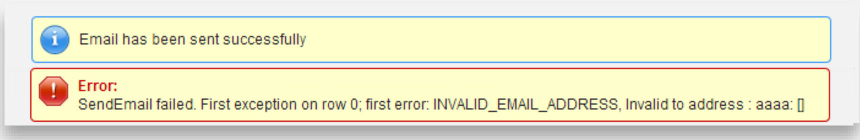


Figure 36

(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 37). 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.

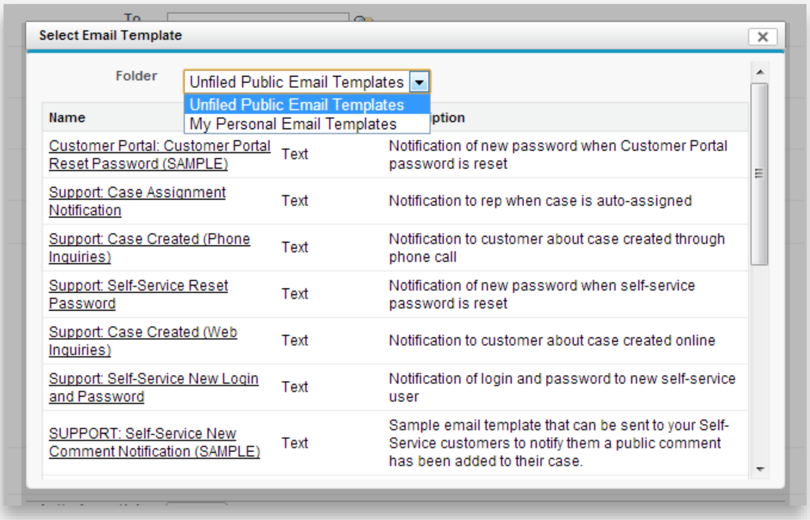


Figure 37

(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 32-13).

Notes

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 38).

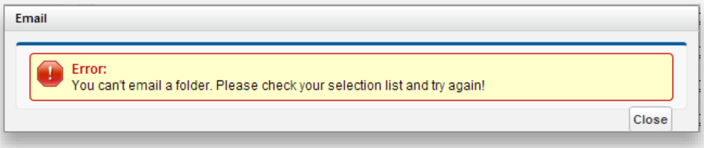


Figure 38

Important Note: *"Attach from S-Drive Folders" button is not supported at the moment for S-Drive for Salesforce Lightning Experience. It will be supported with the upcoming patch releases. See "S-Drive User Guide" for more information about attaching files in Classic version of Salesforce.*

K. Post Files to Chatter

You can make comments on different files you have on your S-Drive files. For this purpose, you can use the “Post to Chatter” functionality. Click on Item Actions Menu of a file and click on “Post to Chatter” (Figure 39).

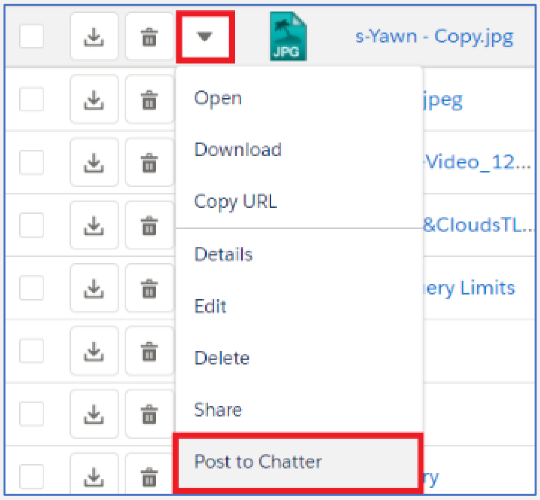


Figure 39

Choosing this option will open a pop-up dialogue where you can share your thoughts on these files with Salesforce’s Chatter.

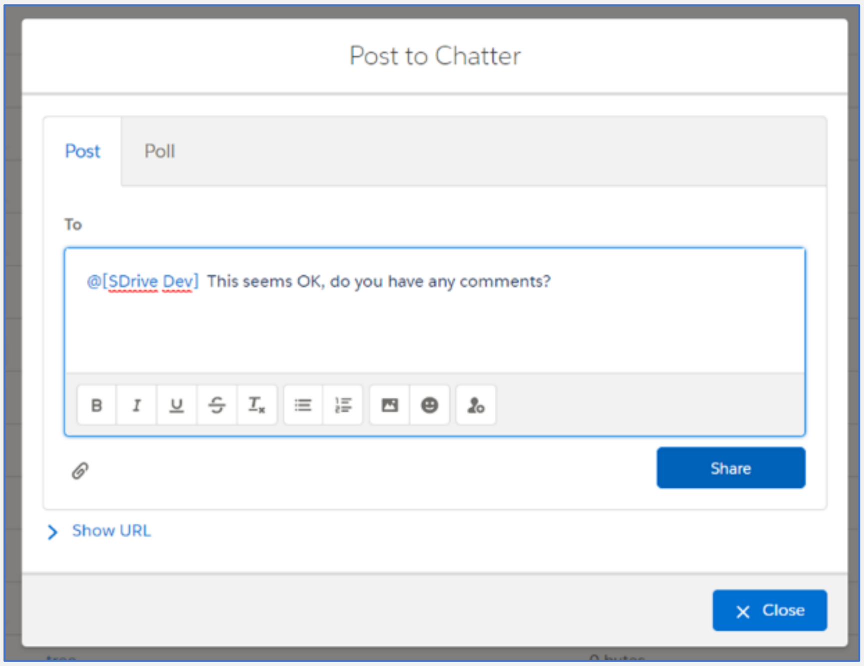


Figure 40

In this pop-up page, you can either post your thoughts, or create a poll and mention users who have access to this file. See the URL of the file in this pop-up box, by clicking on the “Show URL” button on the bottom left side.

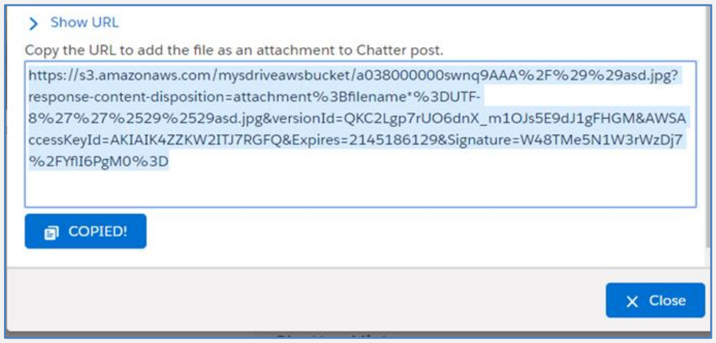


Figure 41

You can reach the Chatter posts about the file from the “Detail” page of the file, by clicking on the “Chatter” tab (Figure 42-1). In this page you can also share posts (Figure 42-2).

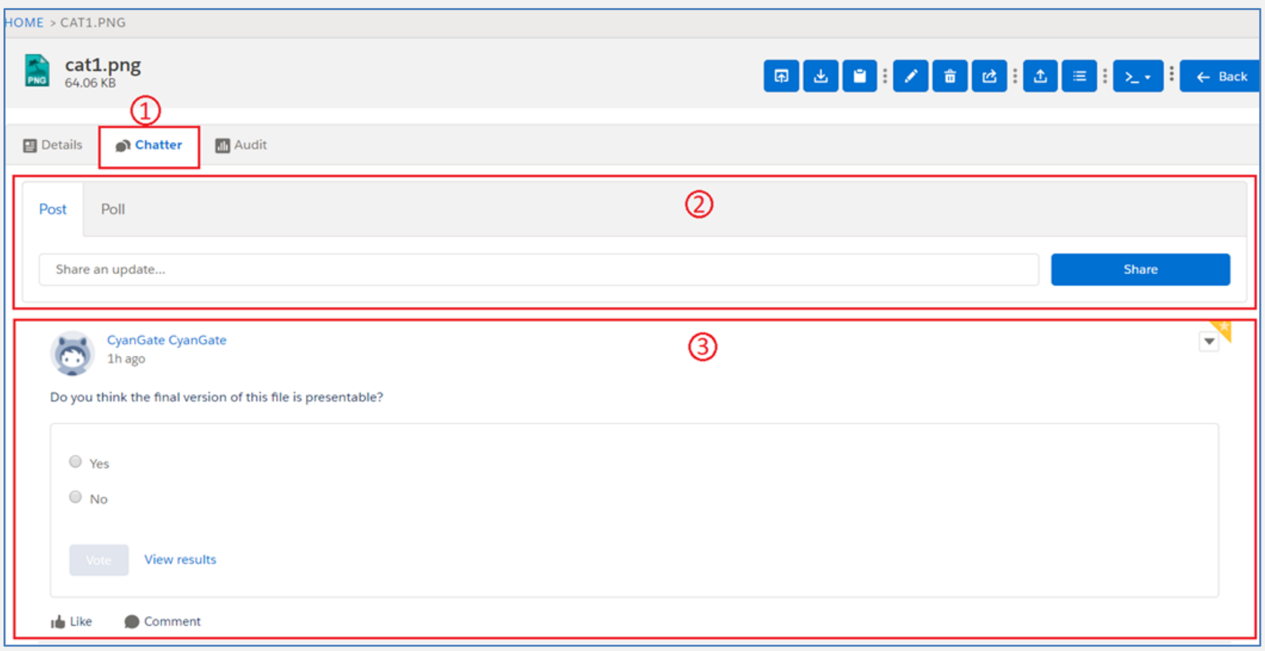


Figure 42

1. In Detail page you can click on the “Chatter” tab to see the chatter related information – the posts and comments – about the file.

2. In this place you can also post your thoughts about the file.

3. Here you can reach the chatter feed. Posts which are made about the specific file will be displayed in this section.

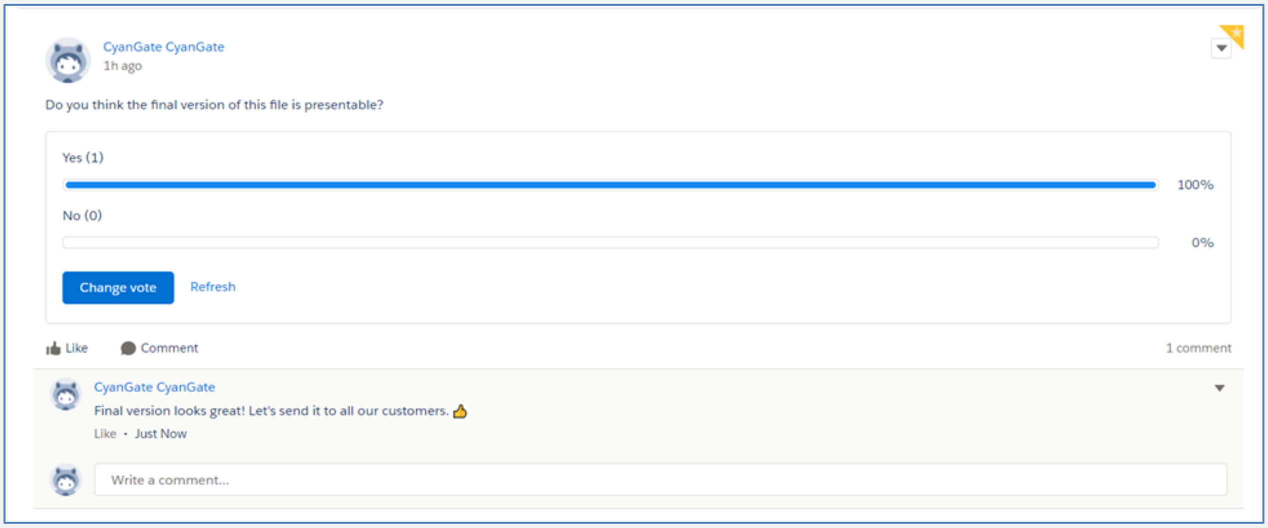


Figure 43

You can also like the posts, make comments about them and vote on polls. The results of these polls can also be displayed in this section.

Note: In order to enable chatter, you should enable it using the S-Drive Configurations and also your Feed Tracking in Salesforce should be enabled on the object type's you want to make posts about. If you do not enable Feed Tracking, you won't be able to use Chatter on S-Drive.

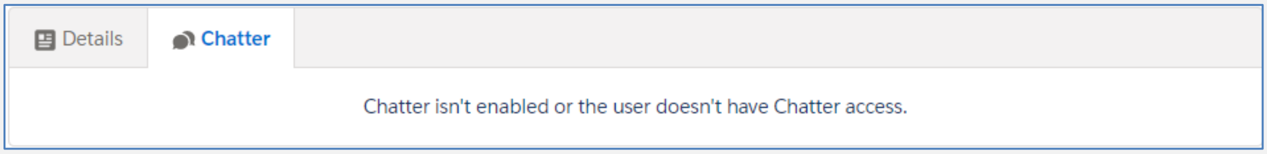


Figure 44

L. Downloading Files

There are two ways of downloading files in S-Drive: **"One File Download"** and **" Zip & Download (Multiple File & Folder Download)"**.

1. One File Download

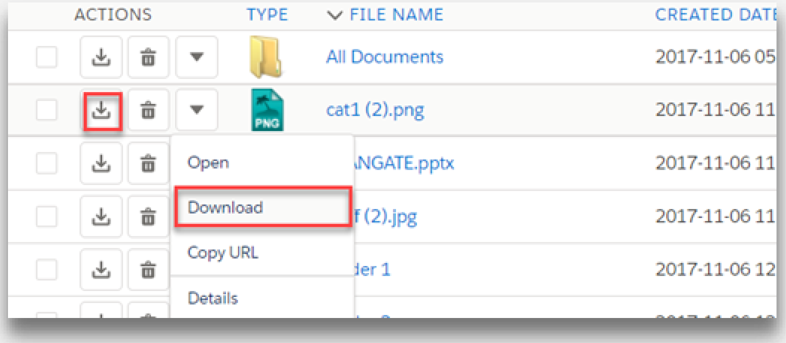


Figure 45

You can download individual files by clicking **"Download"** item menu action and download shortcut button from the "**Item Actions**" button (Figure 45). If "Download" item menu action is selected for file item, download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) If you select “Download” action for a folder it directs to Zip & Download.

2. Zip & Download (Multiple File and Folder Download)

If you choose multiple file and click download button on S-Drive Toolbar, or if you try to download folder by action menu, our service prepares folders and files into a zip file, and start to download zip file automatically (Figure 46).

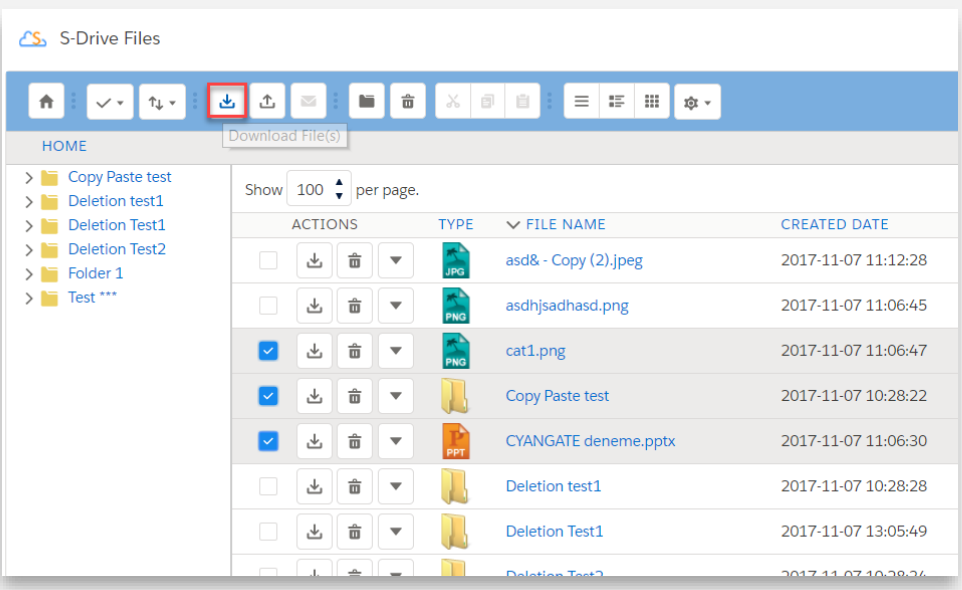


Figure 46

After Zip file prepared, download starts. Zip file is handled by browser, for some browsers download may start immediately, some browsers may ask to download file or not (Figure 47). Zip file can be found under browser's defined download folder. Zip file is named as **[YEAR][MONTH][DAY][HOUR][MINUTE][SECOND]_[OBJECT NAME].zip** .

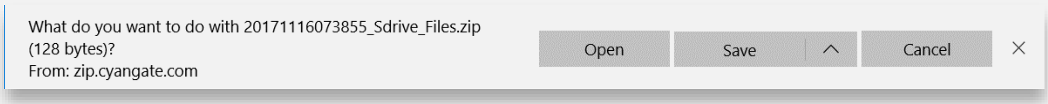


Figure 47

M. Opening Files

If you want to open the files automatically, you should click "Open" link (Figure 48).

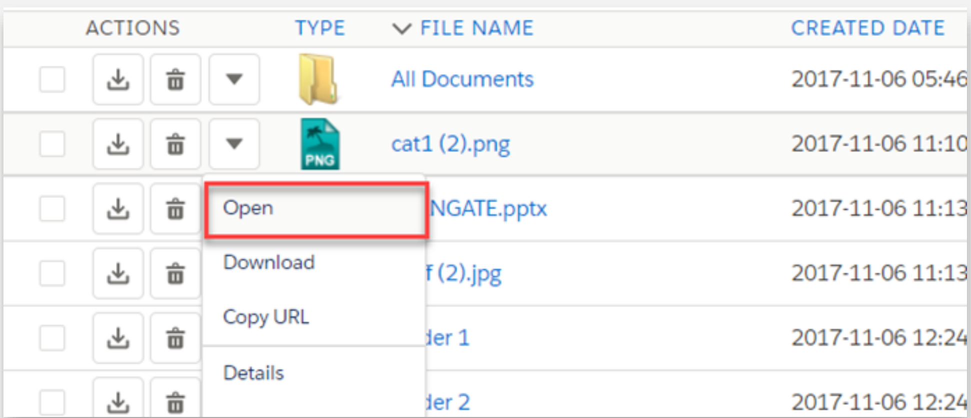


Figure 48

Notes

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

N. 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 49).

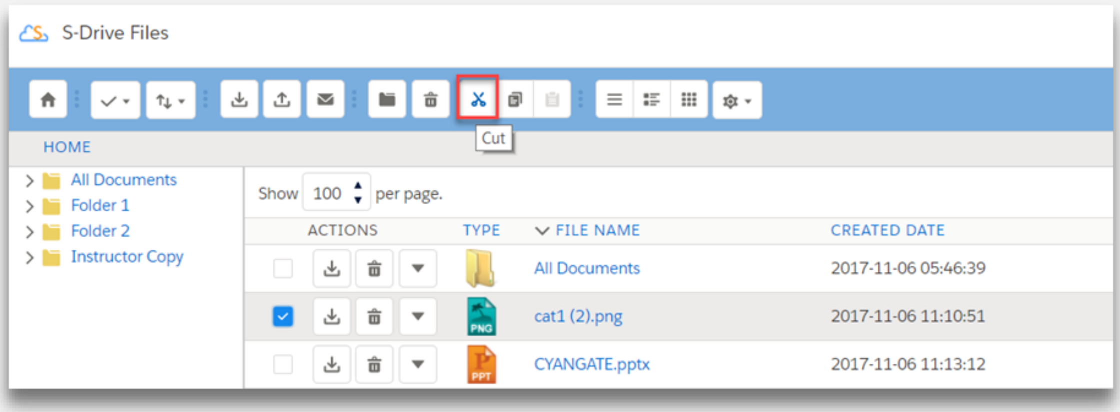


Figure 49

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 50).

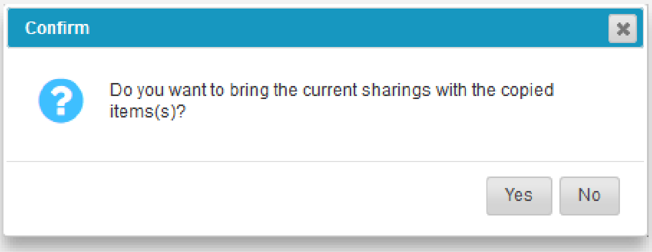


Figure 50

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 51). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.

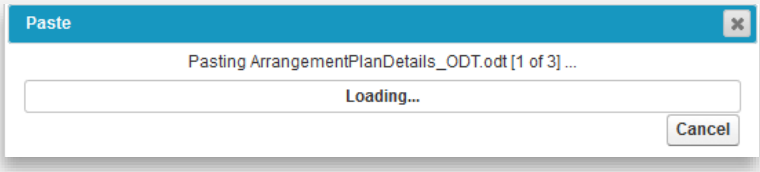


Figure 51

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 52).

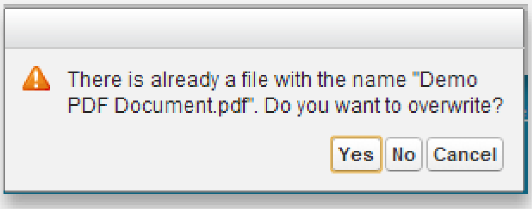


Figure 52

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.

Notes

1. "**Cut**" and **"Paste"** buttons become invisible if you do not have permissions to cut/paste items in the current folder.
2. File will be "**Cut**" and **"Paste"** with all its versions, if you have versions under this file.

O. 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 53).

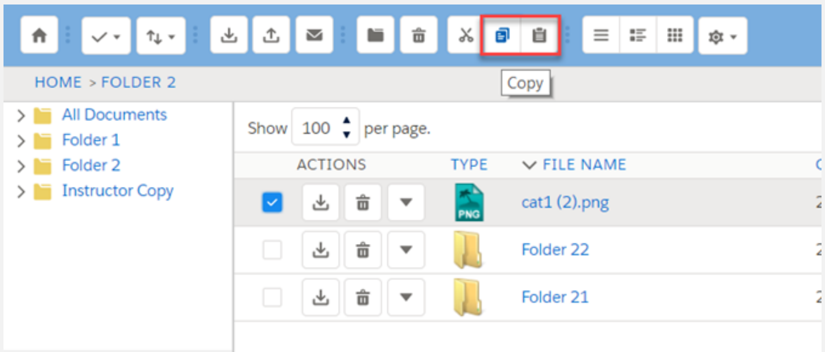


Figure 53

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 54).

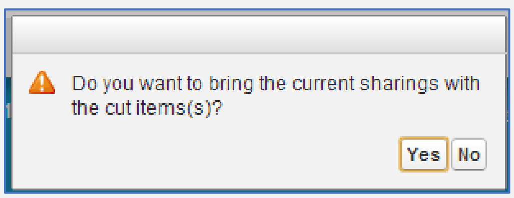


Figure 54

If there is already a file with that name inside the target directory, S-Drive will warn you with the "Do you want continue with paste operation?" message (Figure 55).

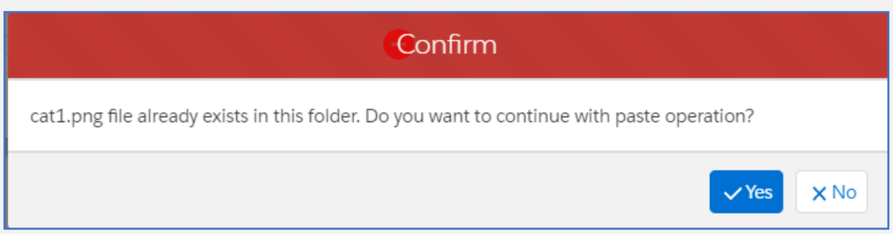


Figure 55

If you select "Yes", it will paste 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.

Notes

1. "**Copy**" and **"Paste"** buttons become invisible if you do not have permissions to copy/paste items in the current folder.
2. If you have versions of your file, only latest version of the will be copied.

P. 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 56).

Figure 56

The Detail page of that file/folder will be opened. You can change the name and description here and click “Save” button to save changes. If you click on “Back” button, the changes will not be saved, and you will be directed to S-Drive Folders screen.

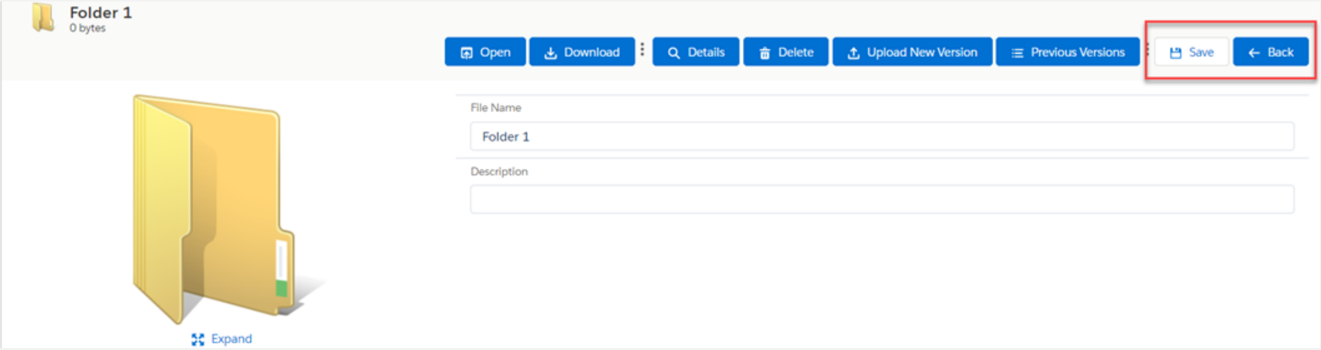


Figure 57

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 58).

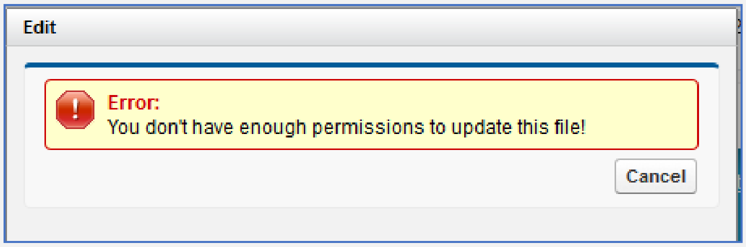


Figure 58

Q. 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 59).

Figure 59

After clicking this button, Copy URL pop-up will be displayed (Figure 60). Select the URL by clicking "Copy" button in this pop-up. You can close this pop-up by clicking "Close" button. After clicking “Copy” button, the button changes to “COPIED!” and the Copy URL for the picture becomes available for usage.

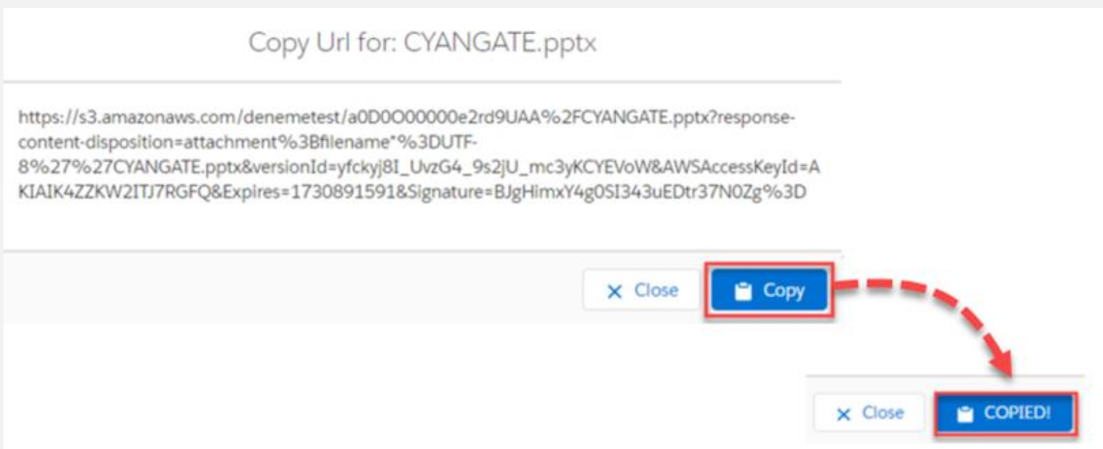


Figure 60

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 61).

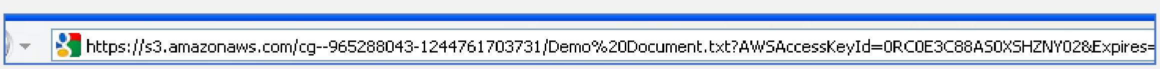


Figure 61

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.
2. If you want to use shorter URLs, please see S-URL section in “S-Drive Advanced Configuration Guide”.

R. Sharing Files & Folders

S-Drive Folders supports object level sharing. 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 62).

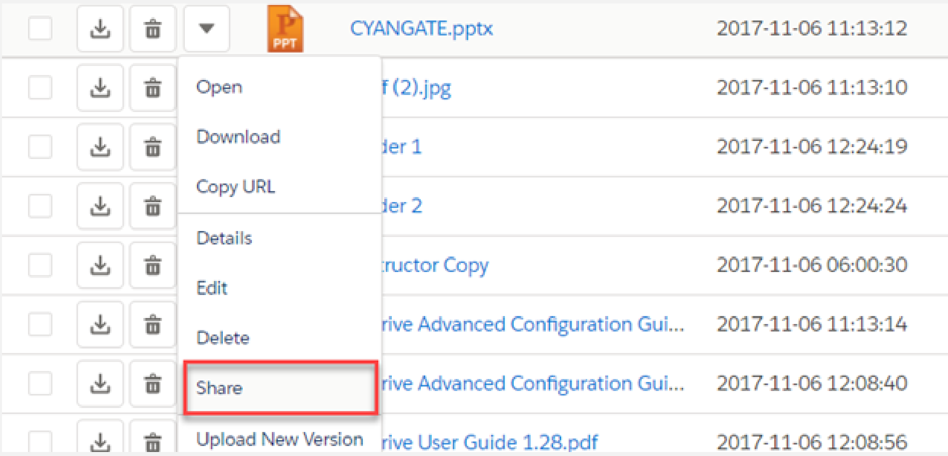
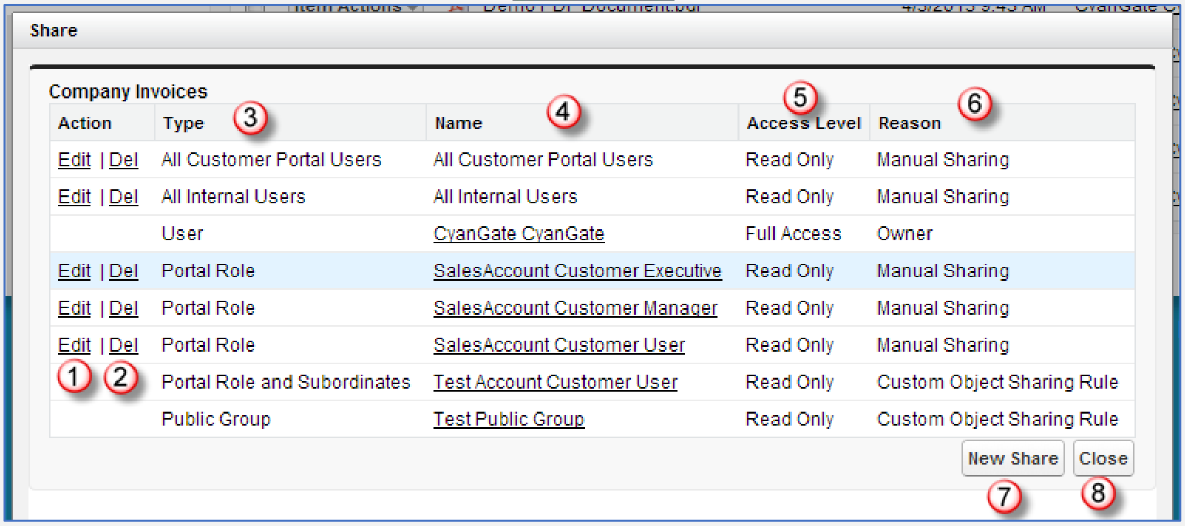


Figure 62

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 63). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.



Action	Type	Name	Access Level	Reason
Edit | Del	All Customer Portal Users	All Customer Portal Users	Read Only	Manual Sharing
Edit | Del	All Internal Users	All Internal Users	Read Only	Manual Sharing
	User	CyanGate CyanGate	Full Access	Owner
Edit | Del	Portal Role	SalesAccount Customer Executive	Read Only	Manual Sharing
Edit | Del	Portal Role	SalesAccount Customer Manager	Read Only	Manual Sharing
Edit | Del	Portal Role	SalesAccount Customer User	Read Only	Manual Sharing
	Portal Role and Subordinates	Test Account Customer User	Read Only	Custom Object Sharing Rule
	Public Group	Test Public Group	Read Only	Custom Object Sharing Rule

Figure 63

"Action" column is used to edit or delete the manual shares (Figure 63-1 and Figure 63-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 63-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 63-4). 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 63-5). "Reason" column displays the reason of the sharing (Figure 63-6). Only manual shares are editable, other types of shares (owner, custom object sharing rule etc.) are for view purposes.

You can add new shares by clicking "New Share" button (Figure 63-7) and close this screen by clicking "Close" button (Figure 63-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 64). You can select the "Type" from the dropdown (Figure 64-1). Once you select the type, available fields will be listed in "Available" section (Figure 64-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 64-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 64-4). 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 64-5).

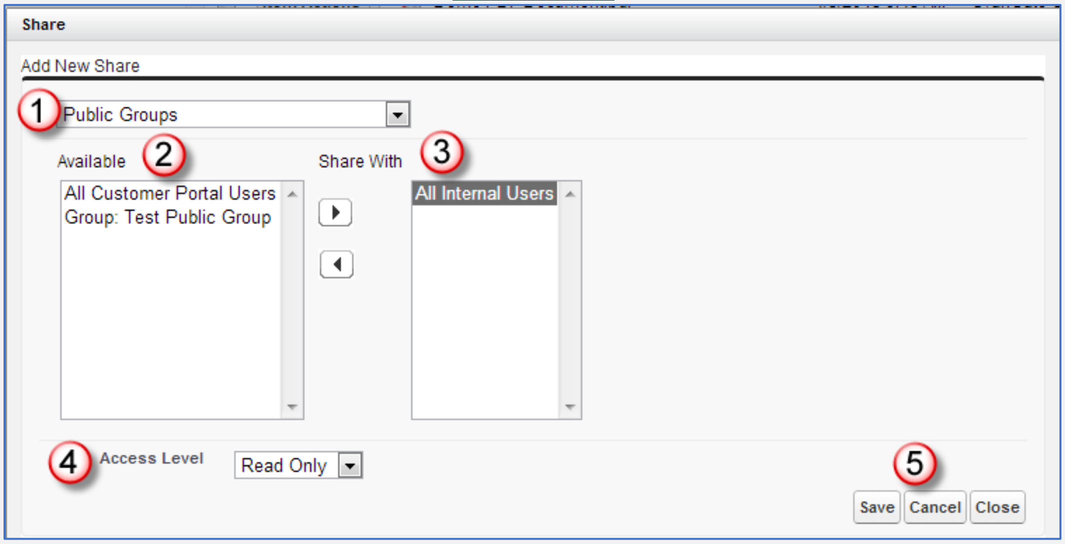


Figure 64

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 63-1). You can change selected object's access level and save (Figure 65).

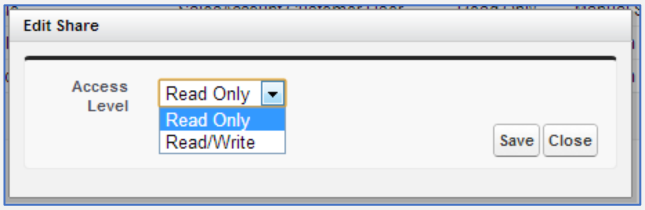


Figure 65

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 63-2). If you select "Yes", share will be deleted (Figure 66).

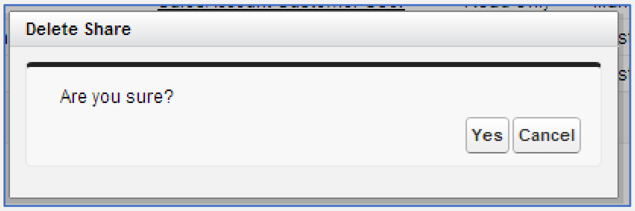


Figure 66

Notes

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, and 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 shares from parent to the newly created folder or file (Figure 67) at the time of creation.

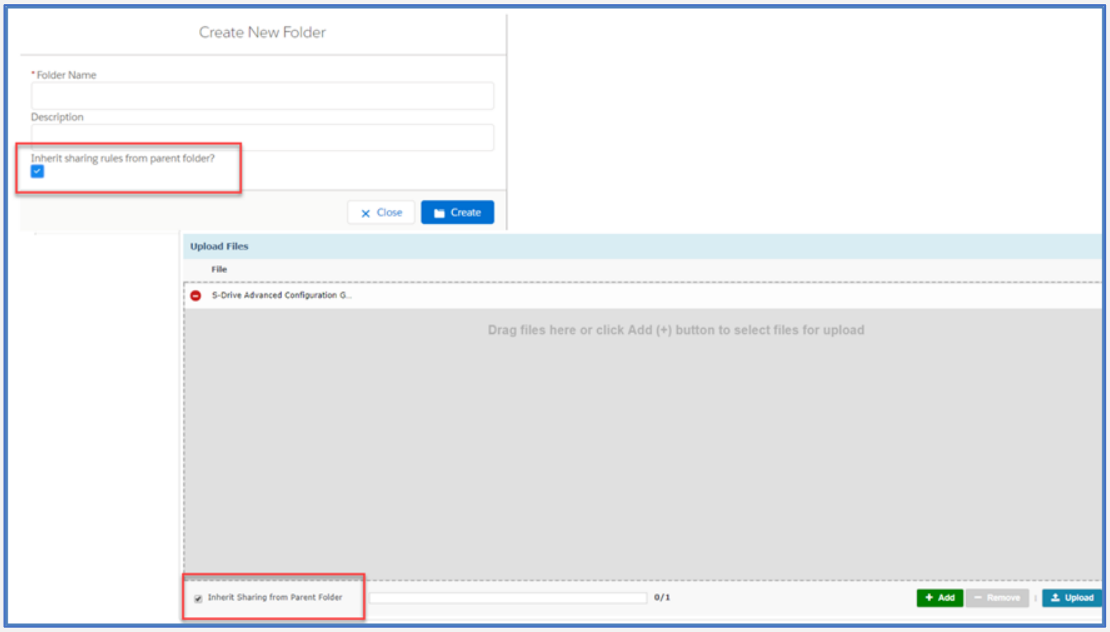


Figure 67

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 shares 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.

S. Public Sharing of Files and Folders

Users can now share certain files and folders publicly. If a single file or folder (along with folder's content) will be shared, file/ folder action dropdown can be used.

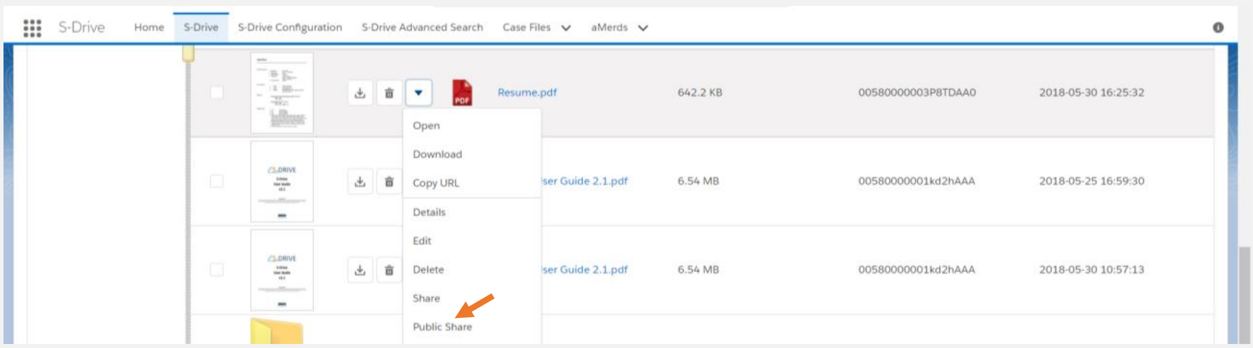


Figure 68

In order to publicly share multiple files/ folders, select files/ folders that you want to share and click on Public Files/ Folders button.

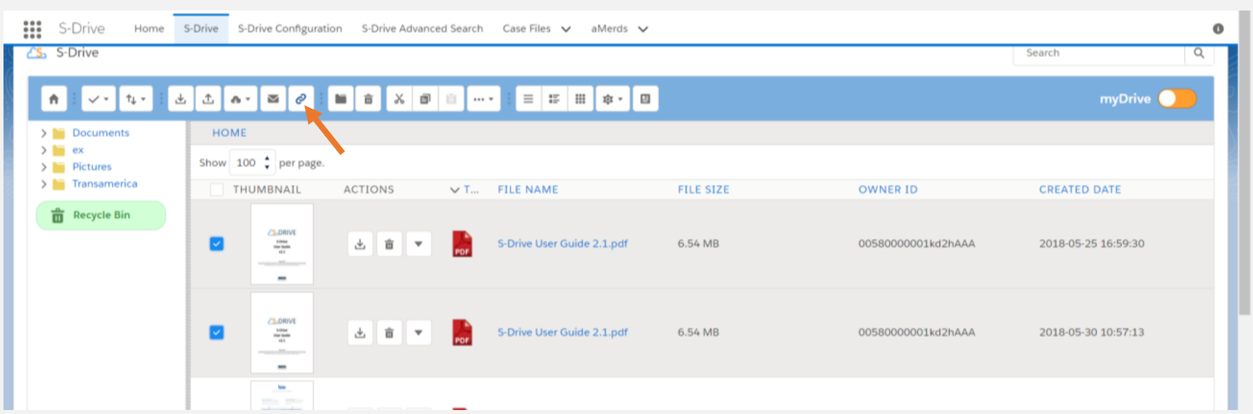


Figure 69

The user will have an option to allow public download of or public access to these files/ folders.

1. Public Download of Files and Folders

Upon selection of files and folders and clicking on public link button, selected items get listed. A secure URL gets generated automatically as well.

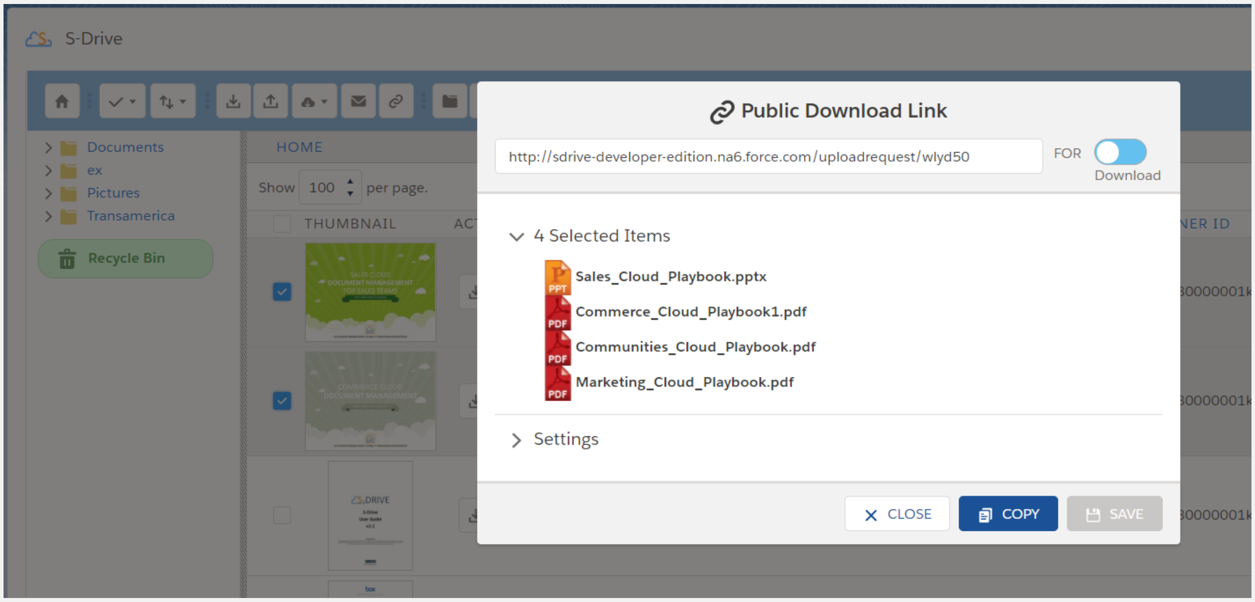


Figure 70

There is also a Settings section where a user can enhance the security of the link via adding a password, expiration date and IP range.

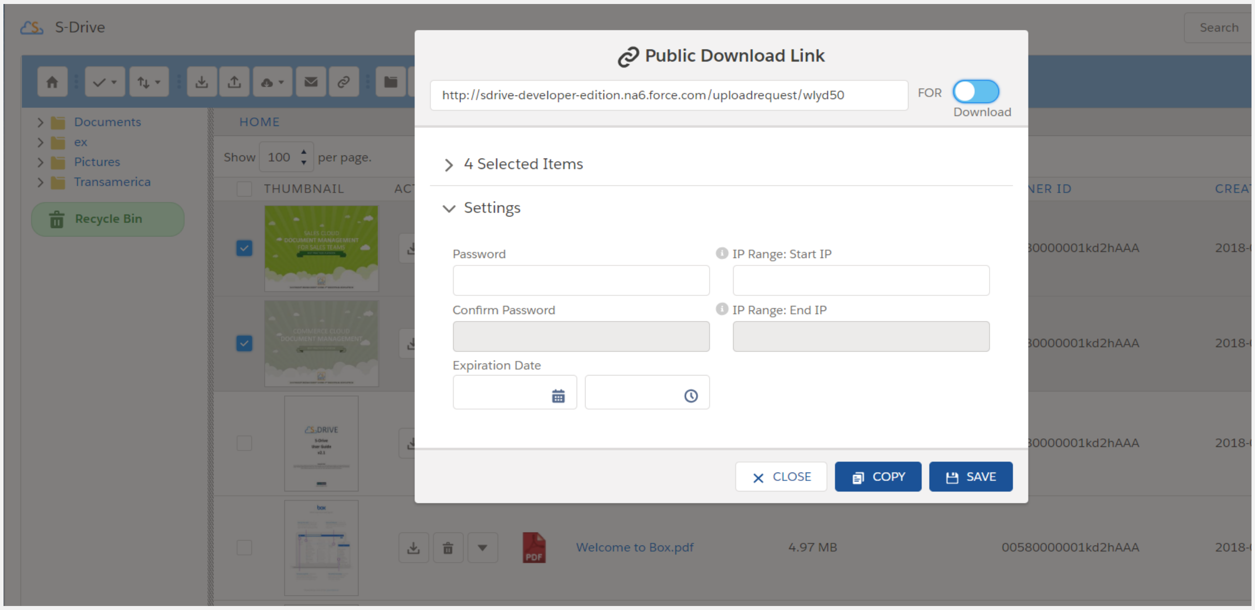


Figure 71

Once the setting is completed, a user should click on SAVE to add new parameters into the link. The link can now we copied over using COPY function and pasted into any browser by any user (even non-Salesforce users). Any user knowing the associated security setting (if a password is set, the password should be known) can download files/ folders.

2. Public Access to Files and Folders

Upon selection of files and folders and clicking on public link button, selected items get listed. A secure URL gets generated automatically as well.

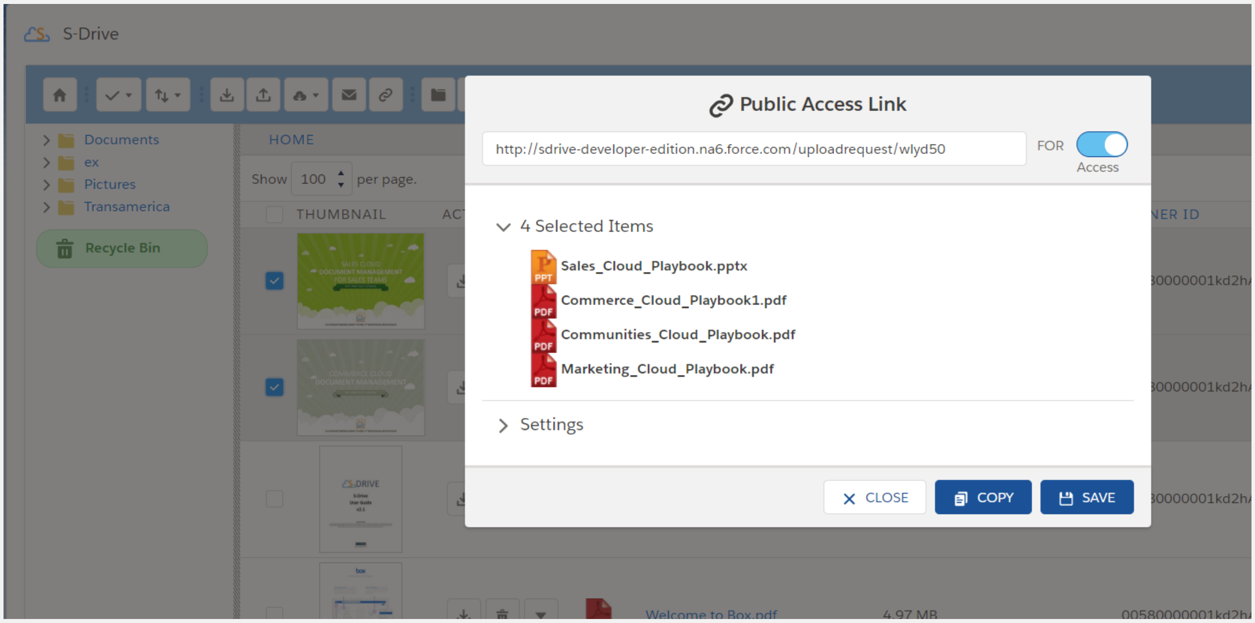


Figure 72

There is also a Settings section where a user can define how selected items can be accessed.

View (/Download): This option brings the public user to download access of selected items

Revise: This option brings the public user access to edit selected items

Upload: This option brings the public user access to upload new files

Delete: This option brings the public user access to delete selected items

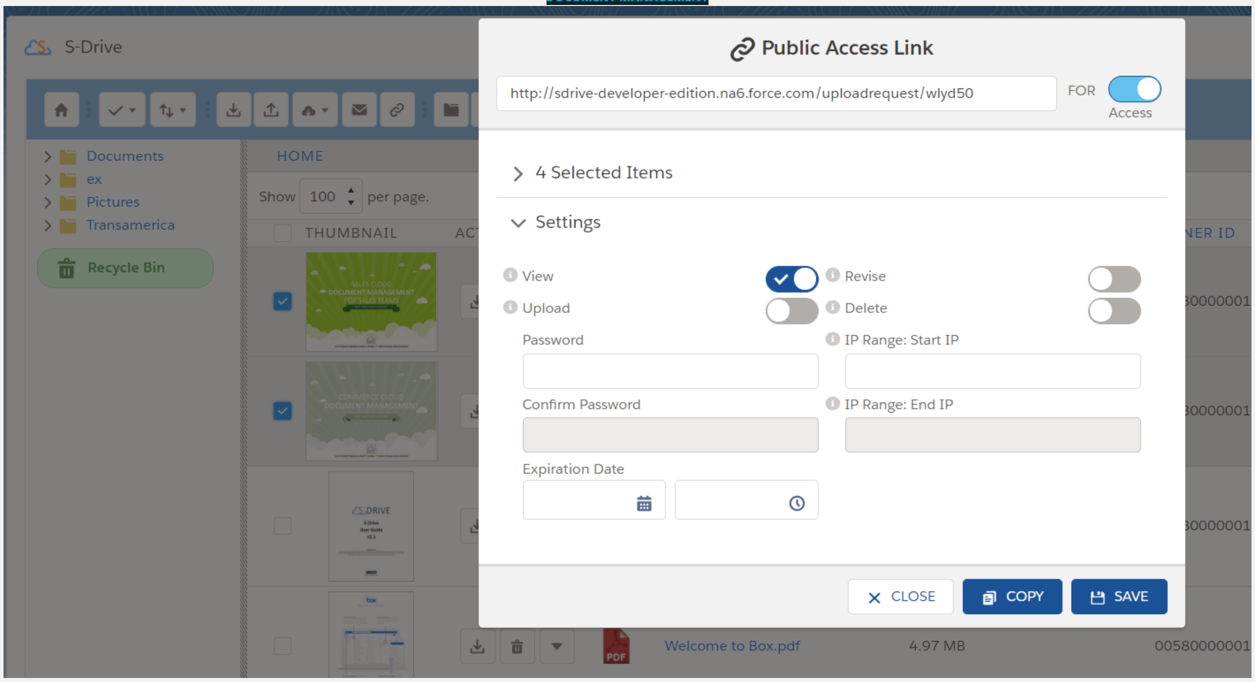


Figure 73

In the Setting section, a user can enhance the security of the link via adding a password, expiration date and IP range as well.

T. Uploading New Version of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can upload new version of a file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files (Figure 74). Only HTML Upload Manager supports version upload.

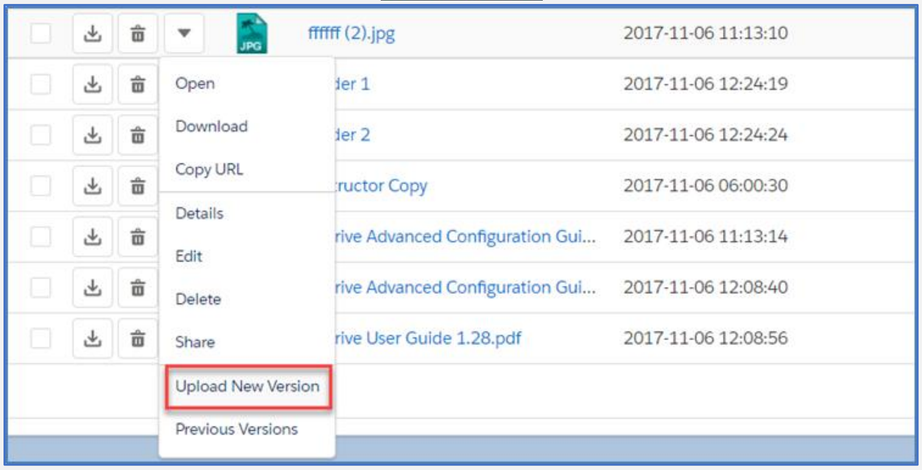


Figure 74

Upload page will be opened, and you will be able to upload new version. You can only upload one file at a time for version upload.

U. Previous Versions of File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 75).

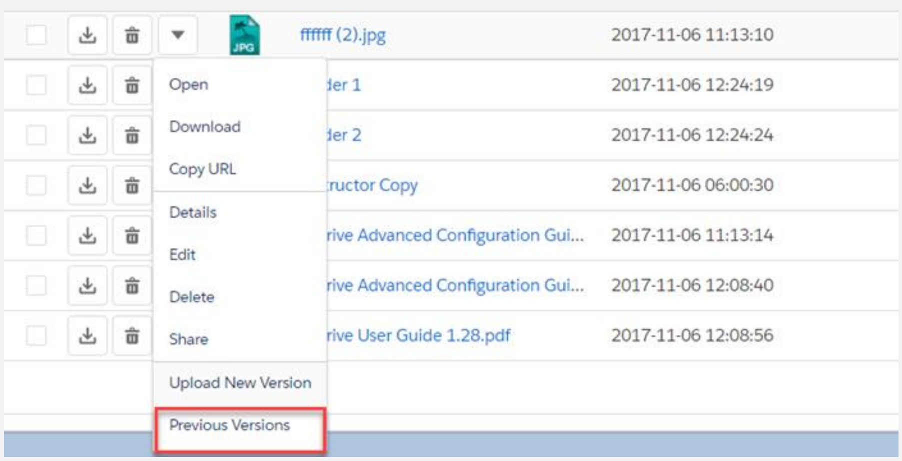


Figure 75

You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting **"Set Current"** action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file. (Figure 76)

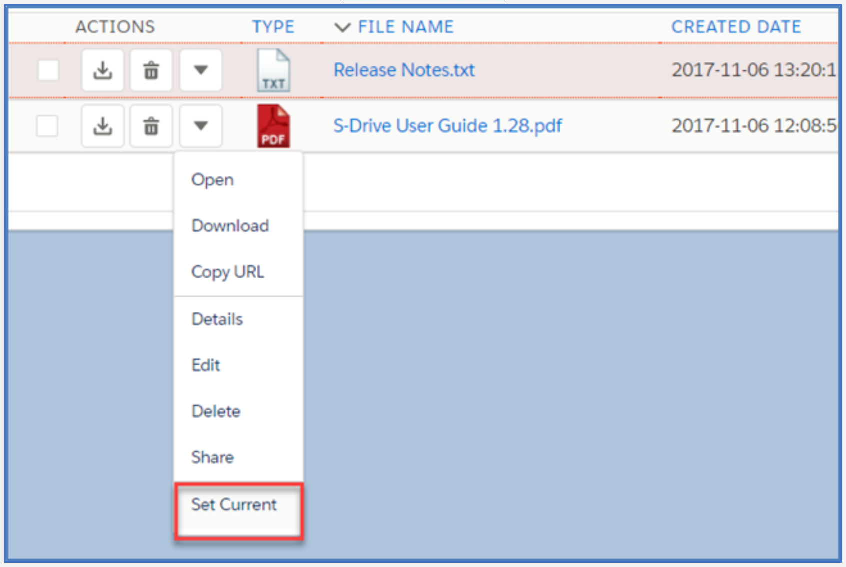


Figure 76

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

actions are same as the other item actions explained above.

V. Changing Displayed Fields

You can change the displayed fields in the file list using the “Field Selection” button (a).

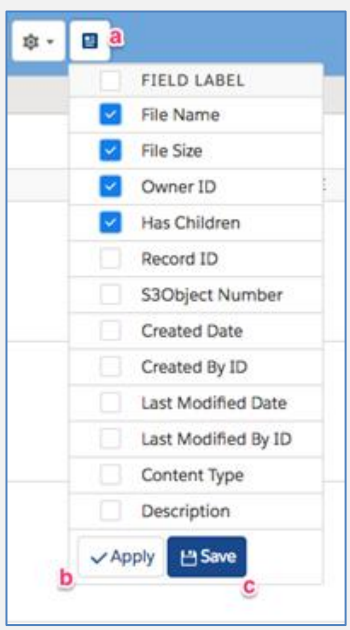


Figure 77

"Apply" button is for after selecting/deselecting the fields to rearrange file list table, to apply these changes to current view of file list (b).

"Save" button is for saving these changes to current view and also saved to user’s profile. So, in another session or when refreshing, these changes will still remain (c).

W. 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.

If you conduct the search under Home directory, it will bring all the results and display them on the file list. If you navigate into a folder before or during search, the search results will only show the results inside that specific folder, and also the results inside the child folders, if there is any.

If you want to conduct a search inside only a specific folder, but not in the child folders, please check “Search in Current Folder” checkbox, which is displayed when you hover on the search bar.

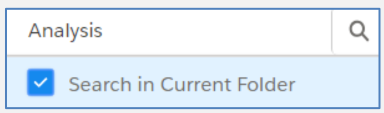


Figure 78

You can use wildcards, ‘***** (multiple characters), **?** (single character)’ in search keywords. For example: *exam*, boo?* etc.

When you perform a search in S-Drive folders, the search will also be made for myDrive folders.

Files and folders that are inside the recycle bin will not be shown in the search results and you cannot conduct a search inside the Recycle Bin.

The results for both will be displayed in the same section with a *‘Search results: XX file(s). S-Drive: X myDrive: X ’* header. 'New Folder', 'Upload File(s)', 'Paste' buttons are invisible in the search results screen. You can go back to previous screen using (Close) button on top right, or you can go to home folder by clicking *‘Home*’ link on the breadcrumb panel or Home button () on toolbar.

The number of search results found in each folder will be shown in the Folder Tree, next to each folder.

Figure 79

To navigate to the search results for myDrive folders, you can click on myDrive button (myDrive: 4). When clicked it will redirect you to myDrive folders.

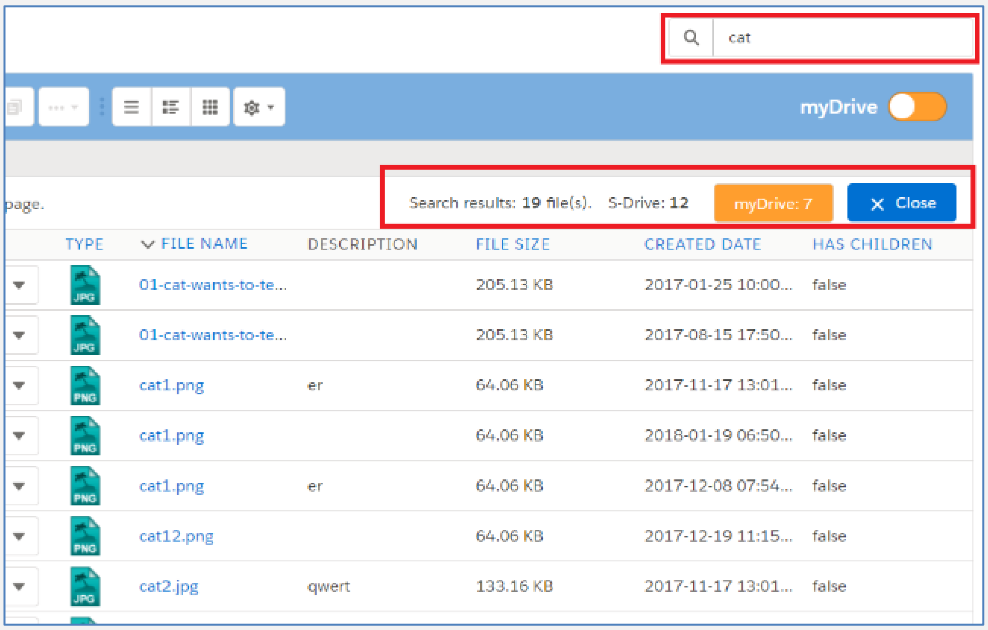


Figure 80

“New Folder”, **“Upload File(s)”**, **“Paste”** buttons are invisible in the search results screen.

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. Search is performed on searchable fields like "File Name" and "Description".

3. If you try to search with blank criteria or with one character, you'll get an error message saying: "*Search key must be longer than 1 character.*" (Figure 81).

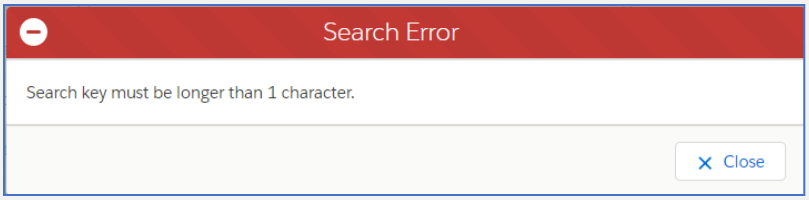


Figure 81

X. iOS (iPad, iPhone, iPod) Support

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments (Figure 82).

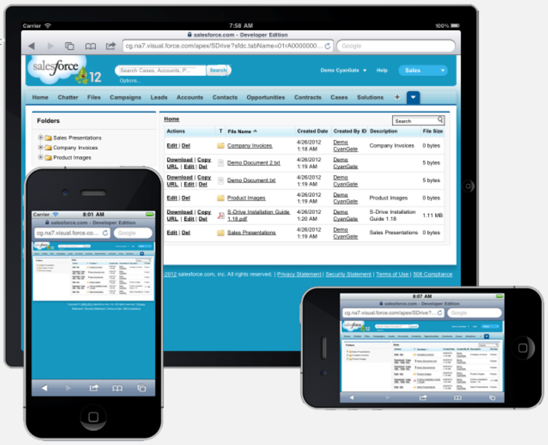


Figure 82

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 83).

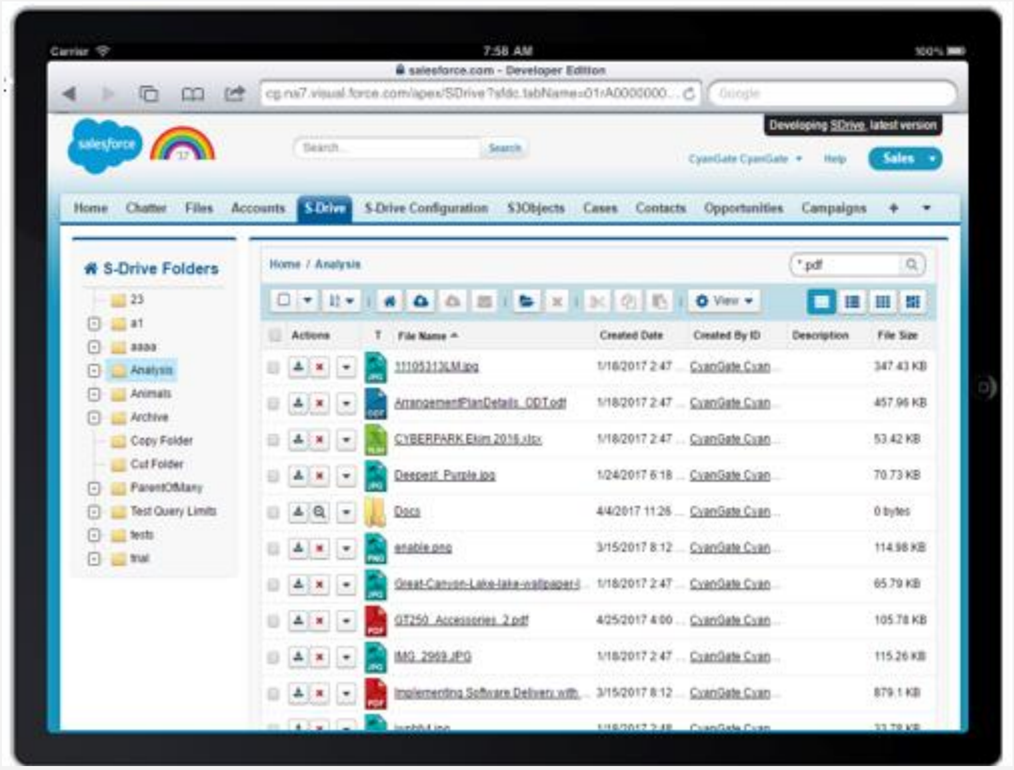


Figure 83

But currently you **cannot upload files, download files using Download Manager for bulk download** with your iOS device. Because iOS devices do 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 like 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 84).

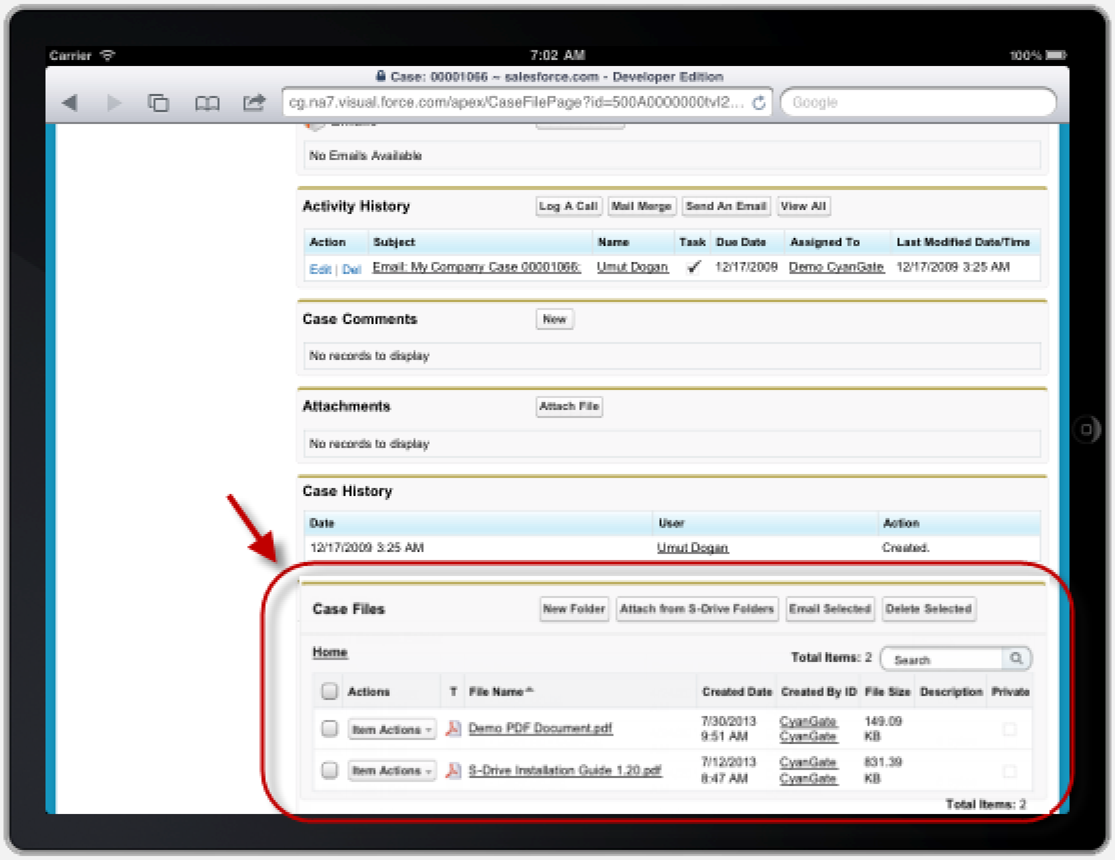

Carrier
7:02 AM
100%
Case: 00001066 ~ salesforce.com - Developer Edition
cg.na7.visual.force.com/apex/CaseFilePage?id=500A0000000tvl2...
Google
No Emails Available
Activity History
Log A Call
Mail Merge
Send An Email
View All
Action
Subject
Name
Task
Due Date
Assigned To
Last Modified Date/Time
Edit | Del
Email: My Company Case 00001066:
Umut Dogan
12/17/2009
Demo CyanGate
12/17/2009 3:25 AM
Case Comments
New
No records to display
Attachments
Attach File
No records to display
Case History
Date
User
Action
12/17/2009 3:25 AM
Umut Dogan
Created.
Case Files
New Folder
Attach from S-Drive Folders
Email Selected
Delete Selected
Home
Total Items: 2
Search
Actions
T
File Name
Created Date
Created By ID
File Size
Description
Private
Item Actions
Demo PDF Document.pdf
7/30/2013 9:51 AM
CyanGate CyanGate
149.09 KB
Item Actions
S-Drive Installation Guide 1.20.pdf
7/12/2013 8:47 AM
CyanGate CyanGate
831.39 KB
Total Items: 2

Figure 84

Y. 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". You can also use multiple S-Drive components under a single object, following 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 85). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.

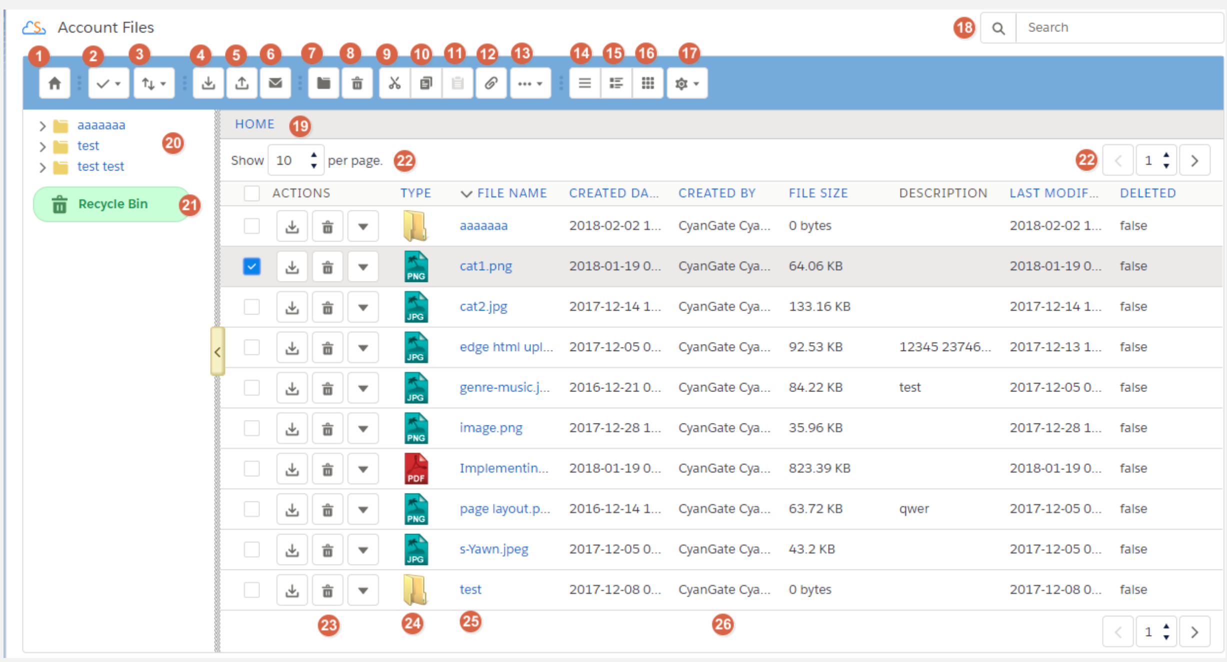


Figure 85

(1) **“Home”** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **“Select All -Dropdown”** button is used to *Select All* or *Deselect All* items in the list.

(3) **“Sort -Dropdown”** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s) to this account. See "Uploading Files" section for more information (Figure 85-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 85-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 85-7). When you click on this button **“Create New Folder”** screen pops up (Figure 86). This item is not displayed for the "Search Results View".

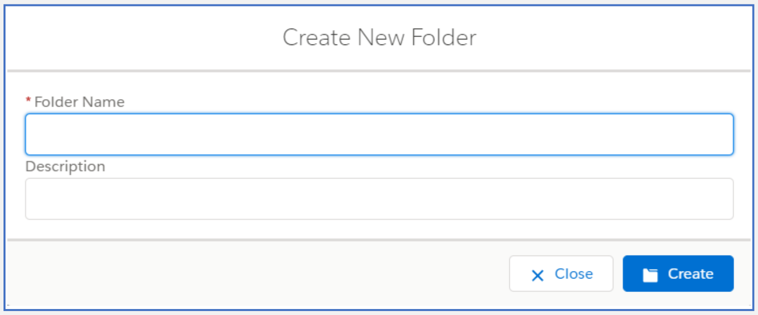


Figure 86

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 85-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 85-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 85-10).

(11) "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 85-11). This item is not displayed for the "Search Results View".

(12) “**Attach From S-Drive”** button is used to attach files from S-Drive Folders to this account. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. 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.

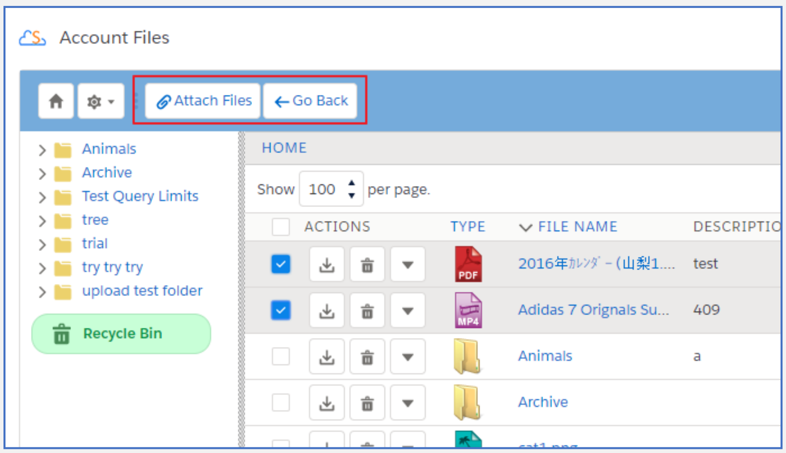


Figure 87

After completion of the attach process, you’ll be asked: "You have successfully attached file(s) from S-Drive. Are you done attaching file(s) from S-Drive?” If you select "Yes", message will be closed, and you’ll be redirected to the account page. "No" button will return you to Attach From S-Drive screen.

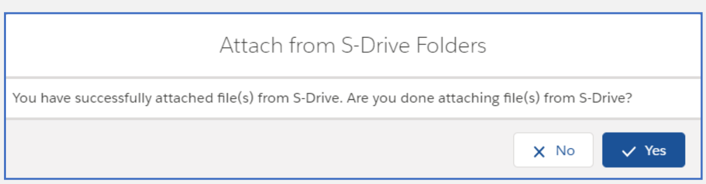


Figure 88

(13) “Custom Actions” button is used to perform different custom actions. See “Custom Actions” section in “S-Drive Advanced Configuration Guide” for more information.

(14) ≡ It changes current view to **List** view. For more information, you can look at **View Types** section.

(15) It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(16) It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(17) By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 85) will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 85 will not be shown.

(18) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 85).

(19) "Breadcrumb Folder Navigation" 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 85). You can click any level to drill down to that subfolder.

(20) "Folder Tree View" displays your account's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(21) "Recycle Bin" button is used for navigating to the Recycle Bin of your Account Files. You can find more information about the Recycle Bin in "Deleting Files" section.

(22) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 85). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(23) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 85). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected account file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected account file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 89). This item menu action is only for files and not available for folders.

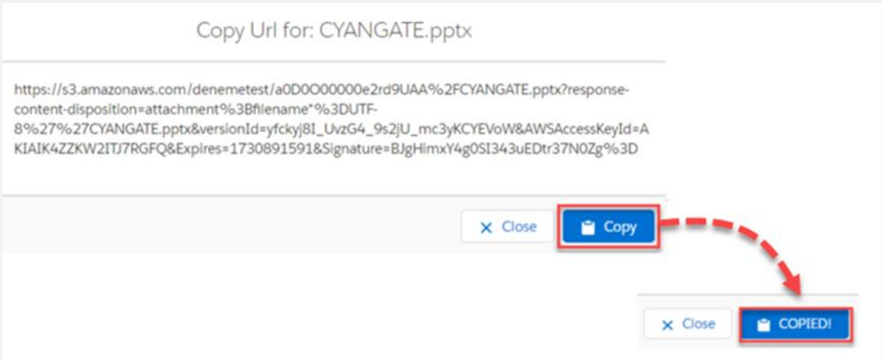


Figure 89

"Details" is used to open the details page of the selected account file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.

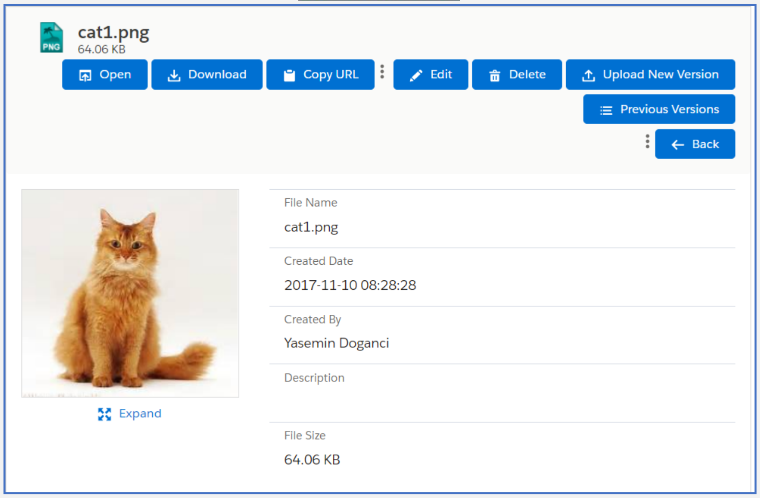


Figure 90

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 91) and you'll be able to edit current account file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.

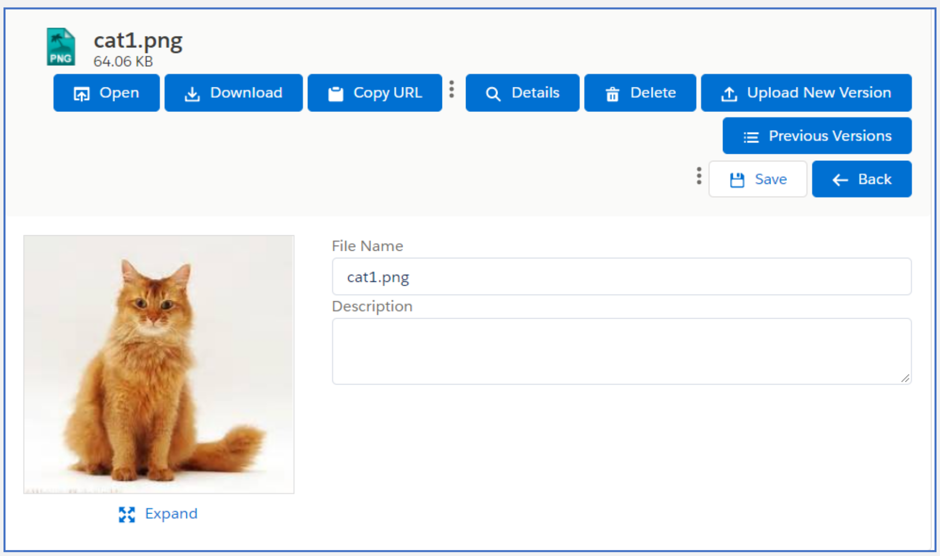


Figure 91

"Delete " is used to delete selected account file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

“Post to Chatter” is used to post comments/thoughts about a file to Salesforce Chatter. After clicking, a pop-up screen will appear, and you will be able to create a post or a poll, mention users, and share your thoughts about a file.

"Upload New Version": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files (Figure 92). Only HTML Upload Manager supports version upload.

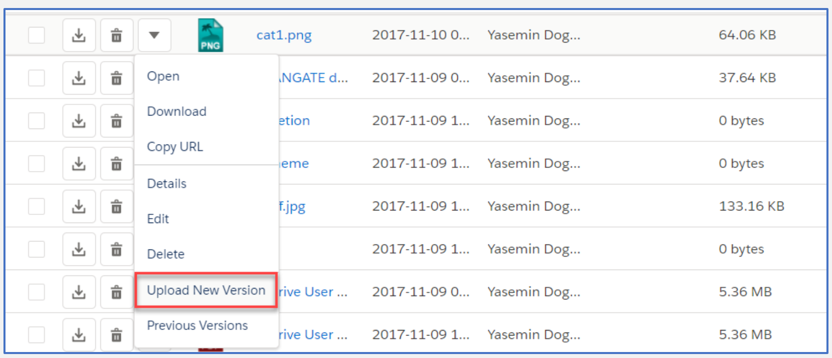


Figure 92

"Previous Versions": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 93).

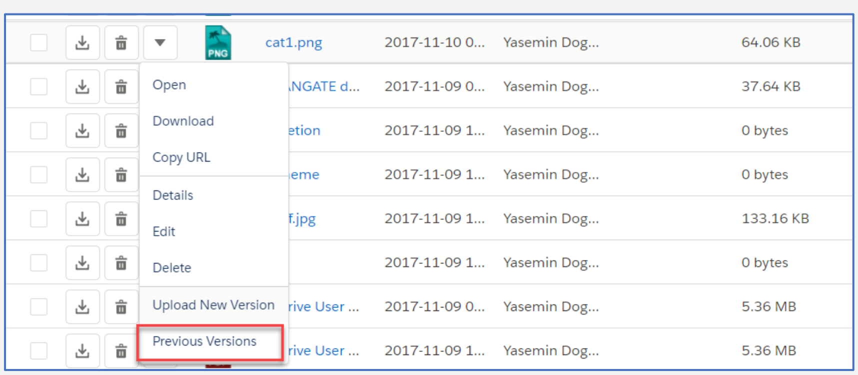


Figure 93

"Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 94).

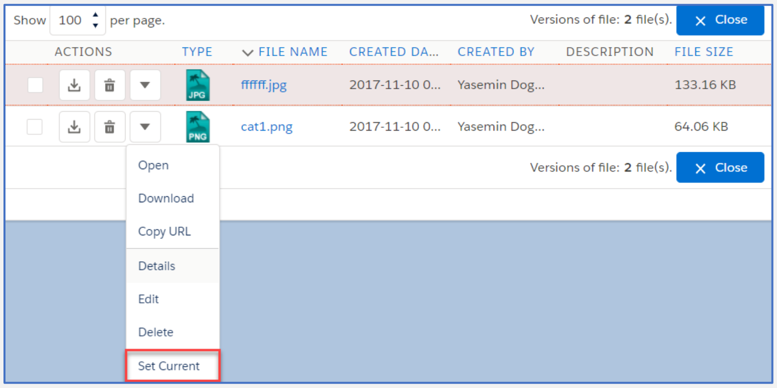


Figure 94

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(24) "Content Type Column" displays a type icon based on the content type of the account file/folder (Figure 85).

(25)"File Name Column" shows the file name information for the account files (Figure 85). You can sort files/folder ascending or descending by clicking the field header.

(26)"Customizable Field Columns" are used to display customizable fields (Figure 85). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

Notes

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 95). You need to delete account files first, and then you can delete the account.

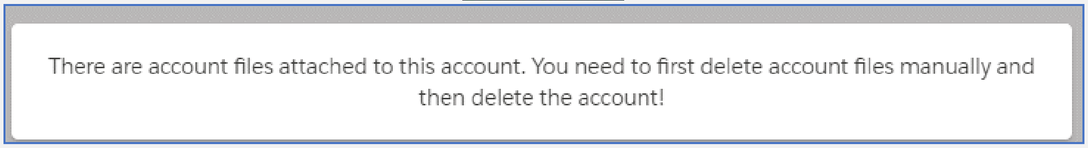


Figure 95

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 "Contacts Files" page block in the current contact’s page, you can keep on reading. Otherwise please consult to the "S-Drive Installation Guide" to activate "Contacts Files" section.

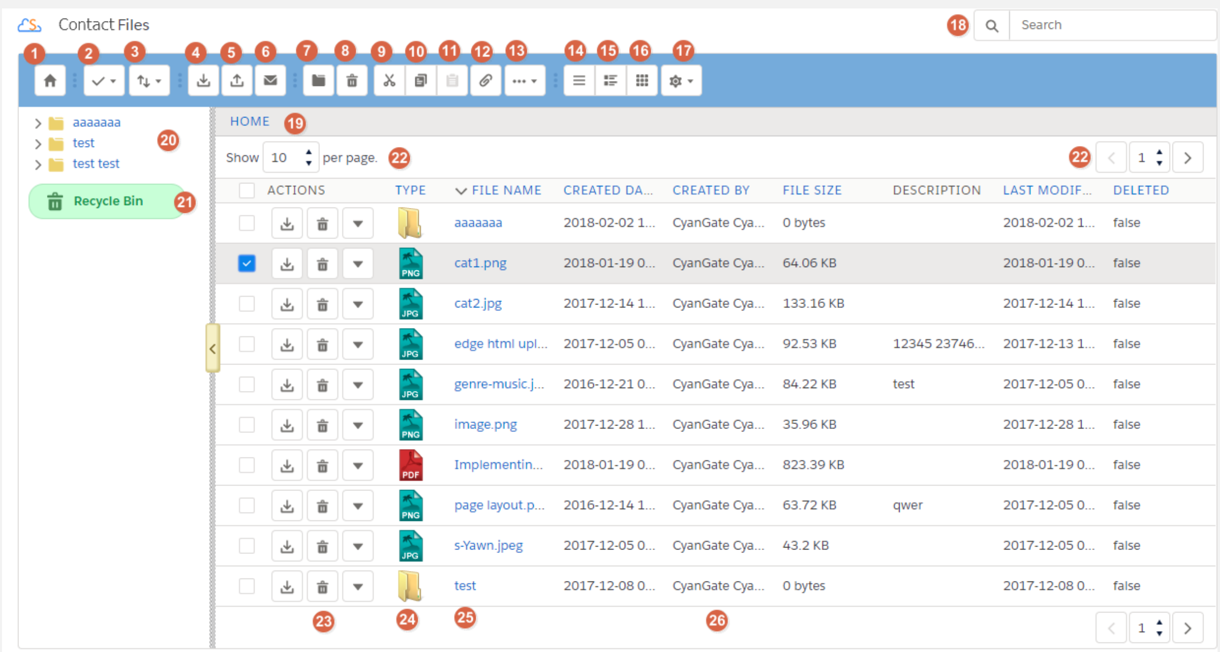


Figure 96

(1) “Home” button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) “Select All -Dropdown” button is used to *Select All* or *Deselect All* items in the list.

(3) **“Sort -Dropdown”** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s) to this contact. See "Uploading Files" section for more information (Figure 85-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 85-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 85-7). When you click on this button **“Create New Folder”** screen pops up (Figure 86). This item is not displayed for the "Search Results View".

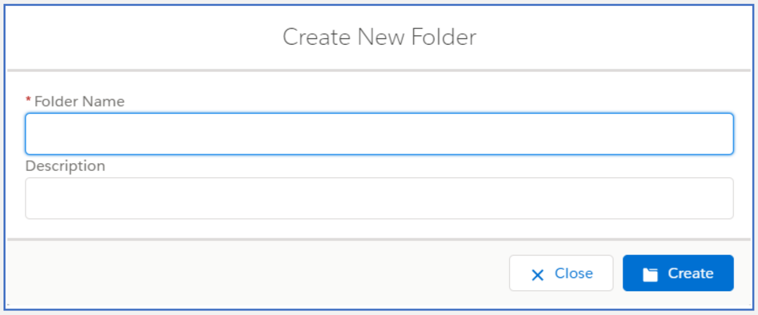


Figure 97

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 85-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 85-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 85-10).

(11) **"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 85-11). This item is not displayed for the "Search Results View".

(12) "**Attach From S-Drive"** button is used to attach files from S-Drive Folders to this contact. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. 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.

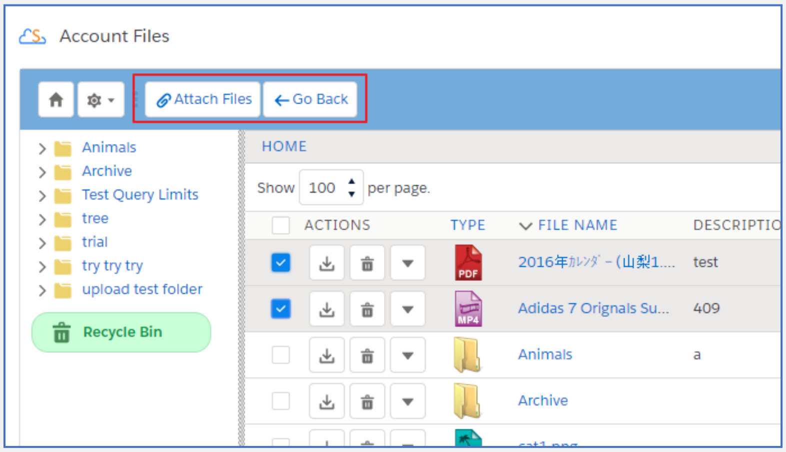


Figure 98

After completion of the attach process, you'll be asked: " You have successfully attached file(s) from S-Drive. Are you done attaching file(s) from S-Drive?" If you select "Yes", message will be closed, and you'll be redirected to the contact page. "No" button will return you to Attach From S-Drive screen.

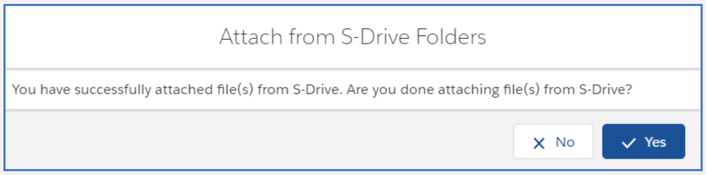


Figure 99

(13) "Custom Actions" button is used to perform different custom actions. See "Custom Actions" section in "S-Drive Advanced Configuration Guide" for more information.

(14) It changes current view to **List** view. For more information, you can look at **View Types** section.

(15) It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(16) It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(17) By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 85) will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 85 will not be shown.

(18) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 85).

(19) "Breadcrumb Folder Navigation" 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 85). You can click any level to drill down to that subfolder.

(20) "Folder Tree View" displays your contact's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(21) "Recycle Bin" button is used for navigating to the Recycle Bin of your Contact Files. You can find more information about the Recycle Bin in "Deleting Files" section.

(22) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 85). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(23) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 85). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

“Open” is used to open the selected contact file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected contact file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer’s “Downloads” folder.

"Copy URL” is 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 89). This item menu action is only for files and not available for folders.

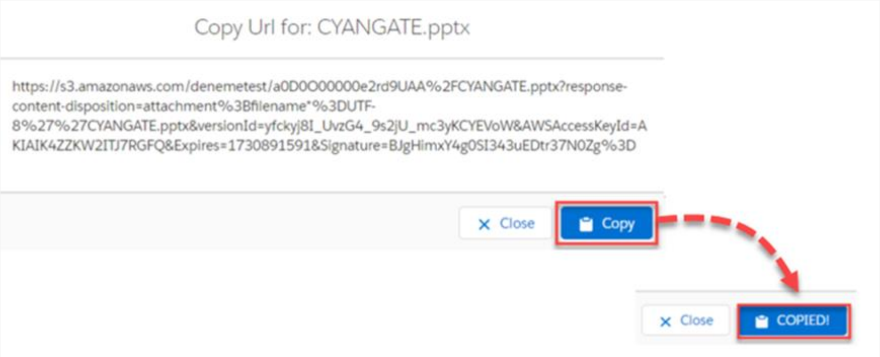


Figure 100

“Details” is used to open the details page of the selected contact file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.

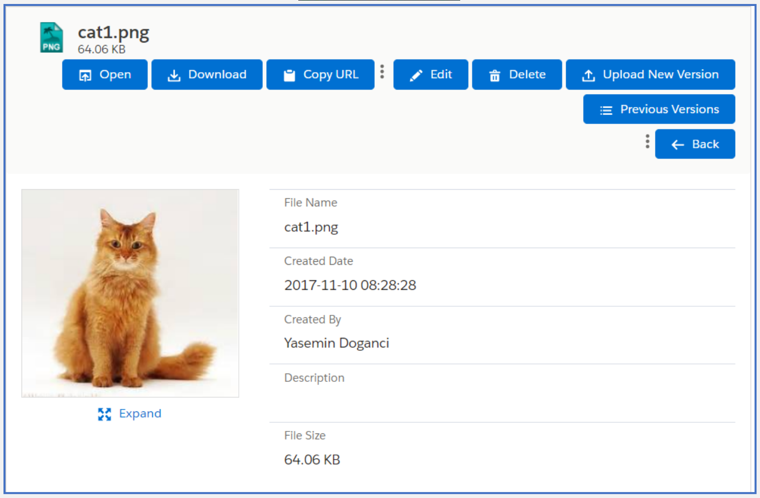


Figure 101

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 91) and you'll be able to edit current contact file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.

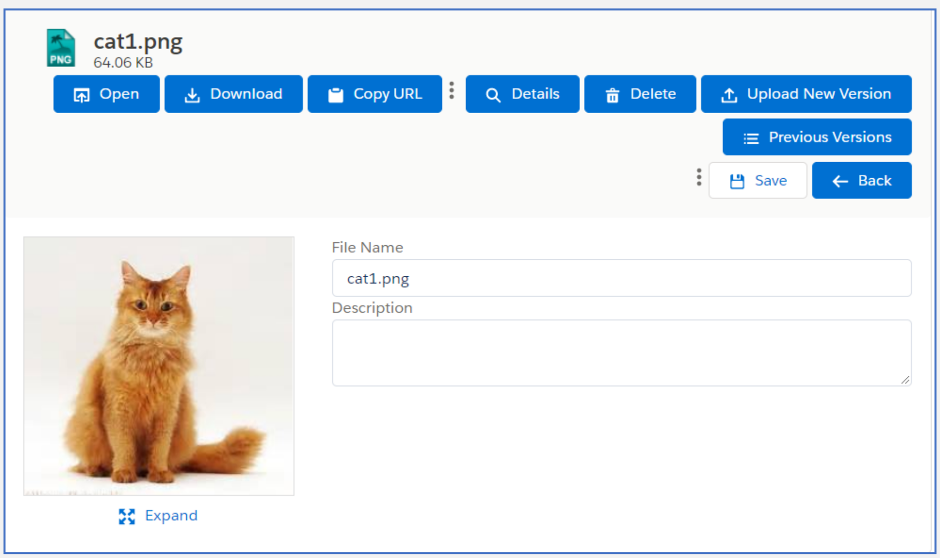


Figure 102

"Delete " is used to delete selected contact file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

“Post to Chatter” is used to post comments/thoughts about a file to Salesforce Chatter. After clicking, a pop-up screen will appear, and you will be able to create a post or a poll, mention users, and share your thoughts about a file.

"Upload New Version": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files (Figure 92). Only HTML Upload Manager supports version upload.

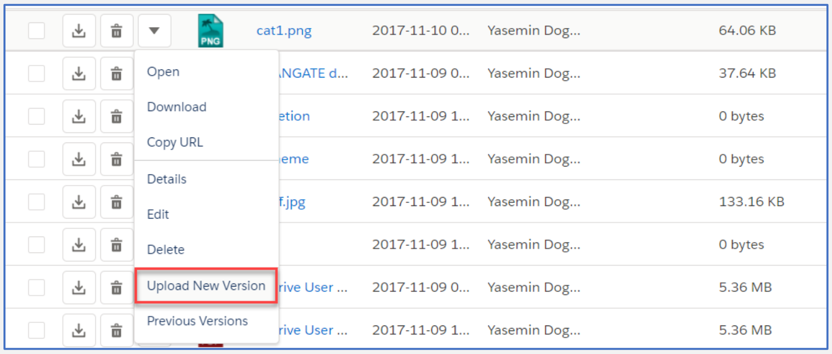


Figure 103

"Previous Versions": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 93).

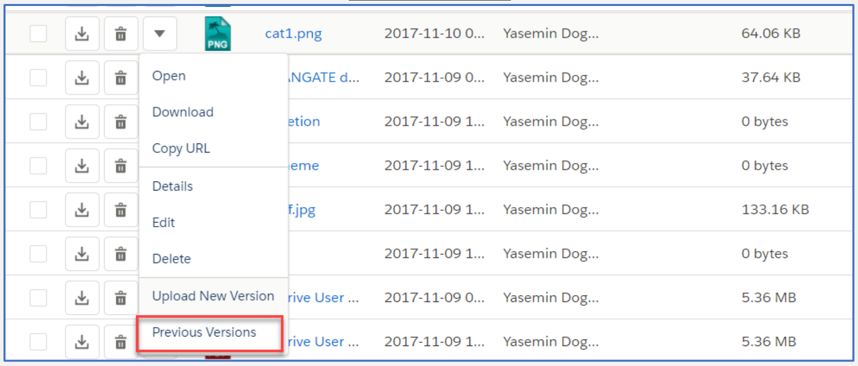


Figure 104

"Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 94).

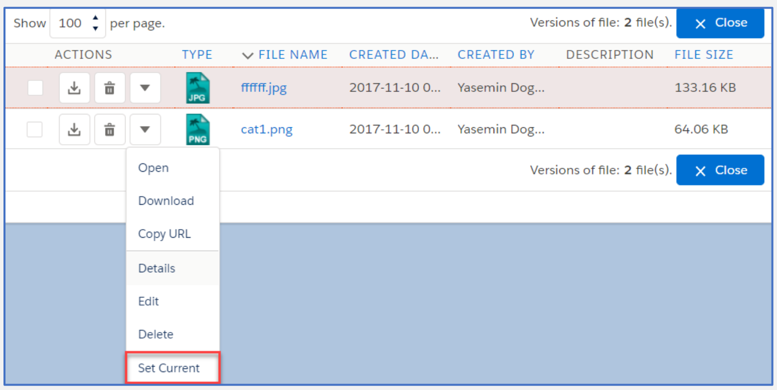


Figure 105

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(24) "Content Type Column" displays a type icon based on the content type of the contact file/folder (Figure 85).

(25)"File Name Column" shows the file name information for the contact files (Figure 85). You can sort files/folder ascending or descending by clicking the field header.

(26)"Customizable Field Columns" are used to display customizable fields (Figure 85). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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 95). You need to delete contact files first, and then you can delete the contact.

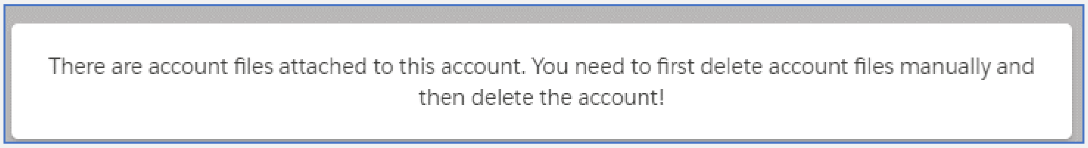


Figure 106

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 "Opportunity" tab for each opportunity easily. Go to your " Opportunity " 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. Otherwise please consult to the "S-Drive Installation Guide" to activate " Opportunity Files" section.

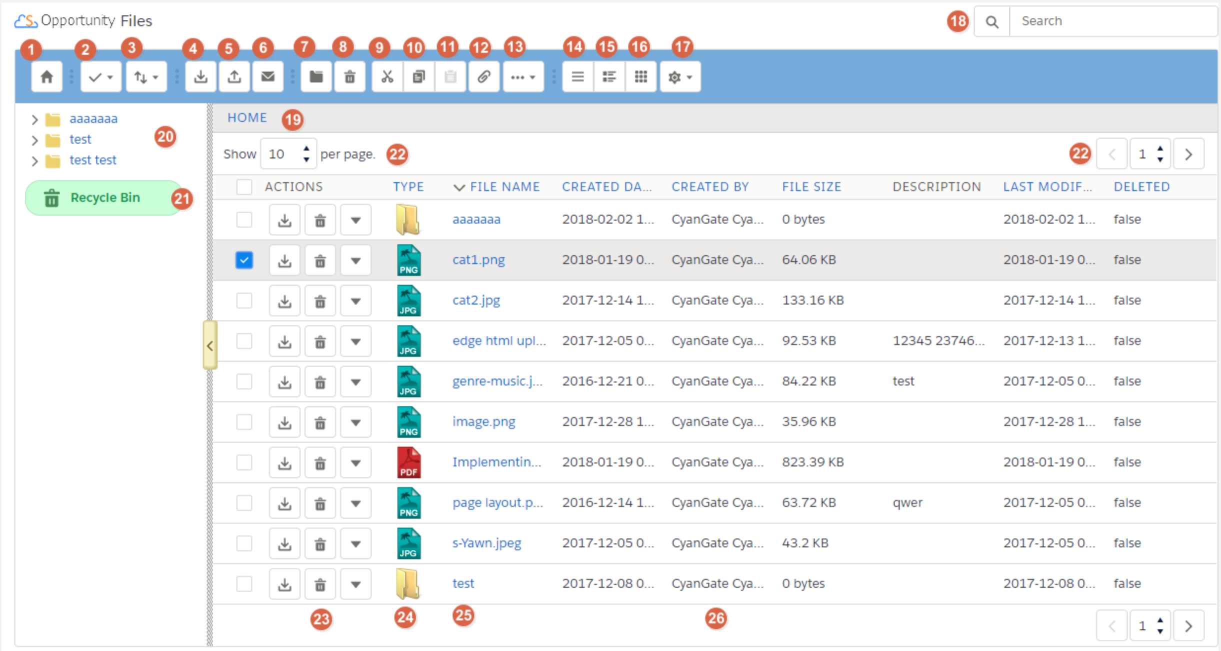


Figure 107

(1) "Home" button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) "Select All -Dropdown" button is used to *Select All* or *Deselect All* items in the list.

(3) "Sort -Dropdown" button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) "Download File(s)" button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) "Upload File(s)" button is used to upload file(s) to this opportunity. See "Uploading Files" section for more information. This item is not displayed for the "Search Results View".

(6) "Email Files" button is used to email files. See "Emailing Files" section for more information.

(7) "Create New Folder" button is used to create folders. See "Creating Folders" section for more information. When you click on this button **"Create New Folder"** screen pops up. This item is not displayed for the "Search Results View".

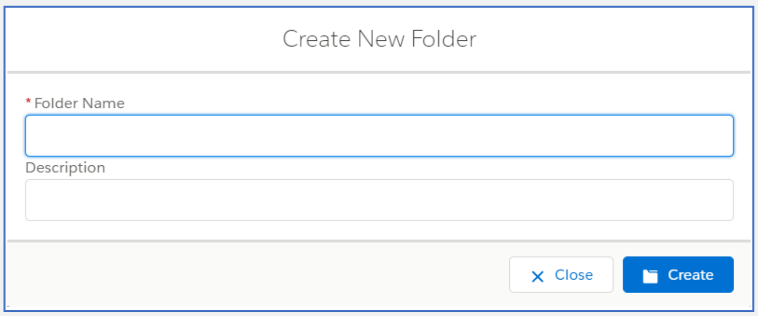


Figure 108

(8) "Delete Selected File(s)" button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information.

(9) "Cut" button is used to move file(s) between folders. See "Moving Files" section for more information.

(10) "Copy" button is used to copy file(s) between folders. See "Copying Files" sections for more information.

(11) "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. This item is not displayed for the "Search Results View".

(12) "**Attach From S-Drive"** button is used to attach files from S-Drive Folders to this opportunity. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. 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.

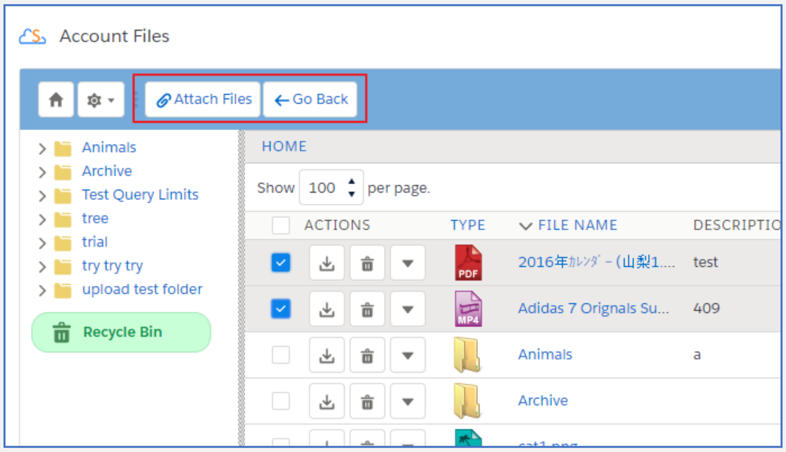


Figure 109

After completion of the attach process, you'll be asked: " You have successfully attached file(s) from S-Drive. Are you done attaching file(s) from S-Drive?" If you select "Yes", message will be closed, and you'll be redirected to the opportunity page. "No" button will return you to Attach From S-Drive screen.

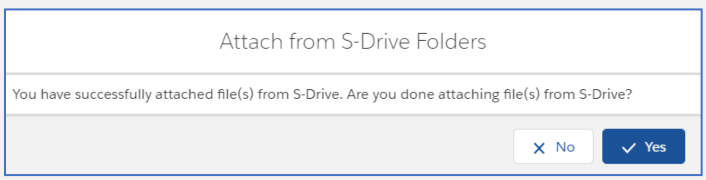


Figure 110

(13) "Custom Actions" button is used to perform different custom actions. See "Custom Actions" section in "S-Drive Advanced Configuration Guide" for more information.

(14)  It changes current view to **List** view. For more information, you can look at **View Types** section.

(15)  It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(16)  It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(17)  By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide

Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel will not be shown.

(18) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information.

(19) "Breadcrumb Folder Navigation" keeps the current folder information. For example, if you are under *"Home/Company Invoices"* folder, the location information will be displayed in this area. You can click any level to drill down to that subfolder.

(20) "Folder Tree View" displays your opportunity's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(21) "Recycle Bin" button is used for navigating to the Recycle Bin of your Opportunity Files. You can find more information about the Recycle Bin in "Deleting Files" section.

(22) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number. If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(23) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected opportunity file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected opportunity file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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. This item menu action is only for files and not available for folders.

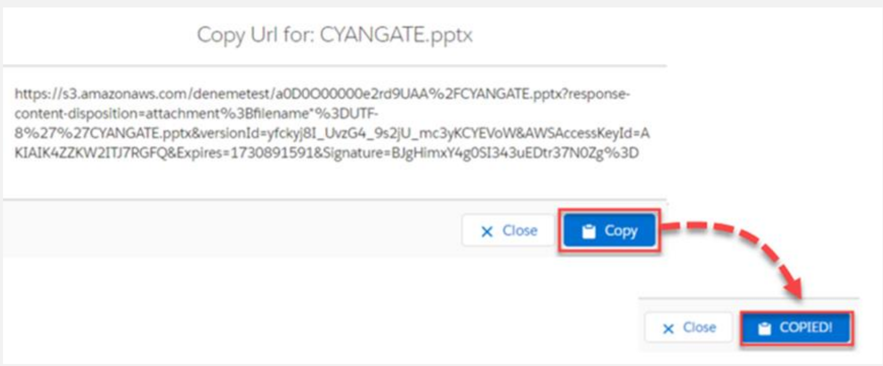


Figure 111

"Details" is used to open the details page of the selected opportunity file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.

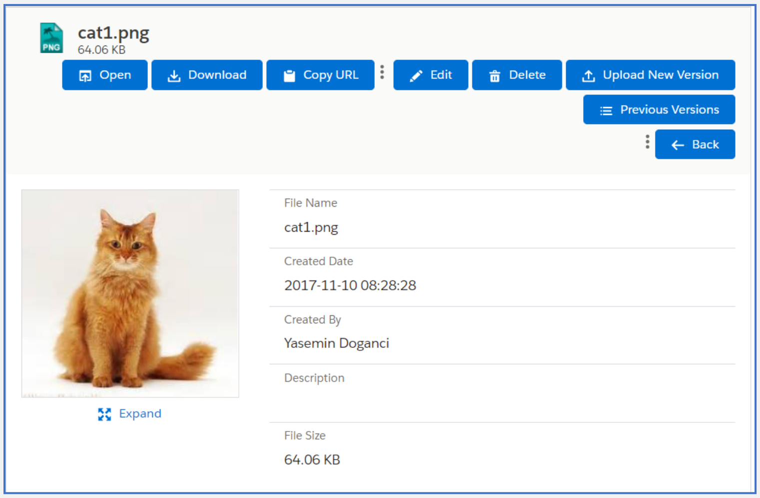


Figure 112

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened and you'll be able to edit current opportunity file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.

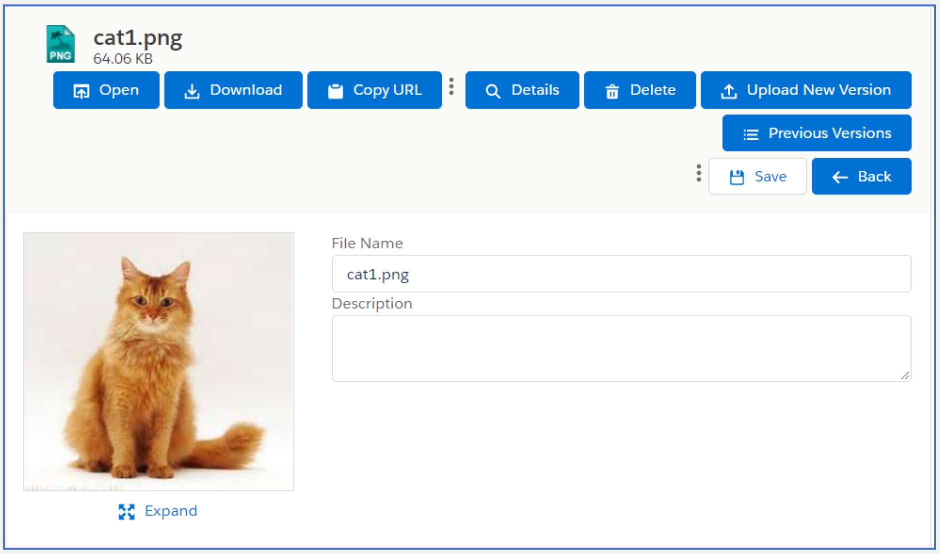


Figure 113

"Delete " is used to delete selected opportunity file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

"Post to Chatter" is used to post comments/thoughts about a file to Salesforce Chatter. After clicking, a pop-up screen will appear, and you will be able to create a post or a poll, mention users, and share your thoughts about a file.

"Upload New Version": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual filesFigure 92. Only HTML Upload Manager supports version upload.

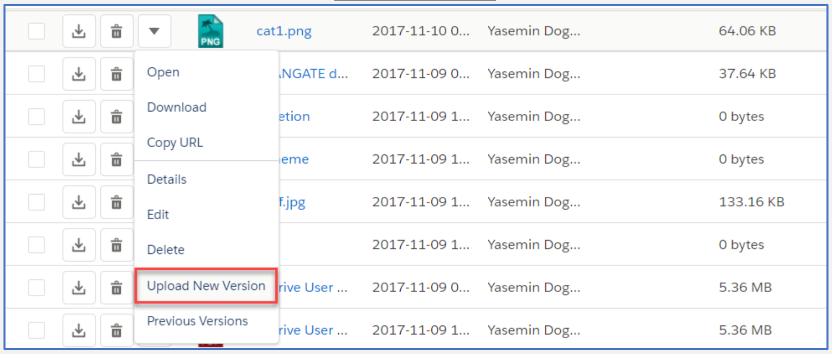


Figure 114

"Previous Versions": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files.

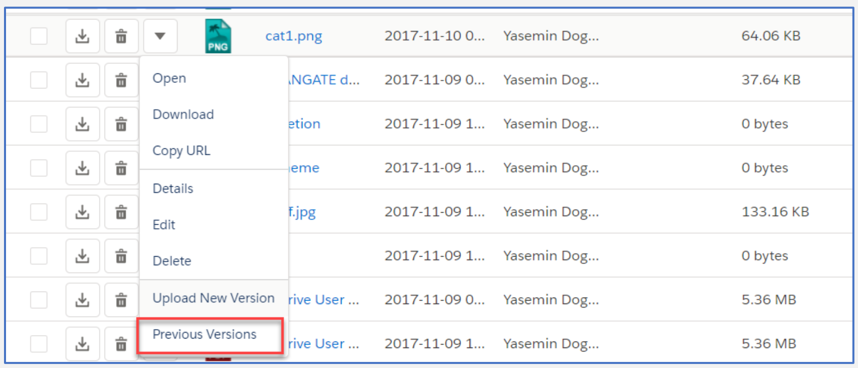


Figure 115

"Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file.

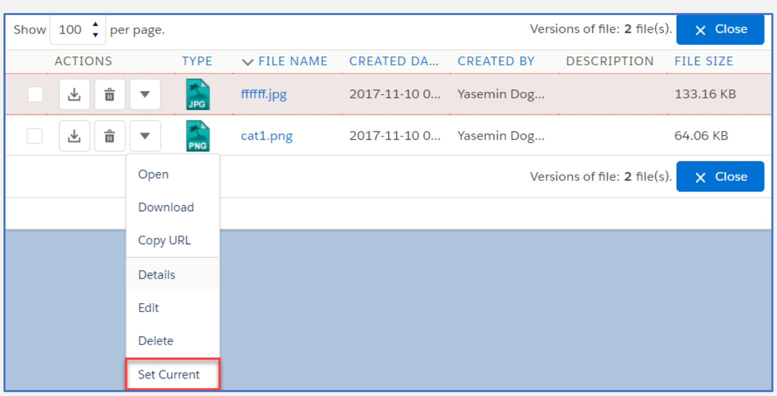


Figure 116

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(24) “Content Type Column” displays a type icon based on the content type of the opportunity file/folder.

(25)"File Name Column" shows the file name information for the opportunity files. You can sort files/folder ascending or descending by clicking the field header.

(26)"Customizable Field Columns" are used to display customizable fields. Your Salesforce.com opportunity’s system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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. You need to delete opportunity files first, and then you can delete the opportunity.

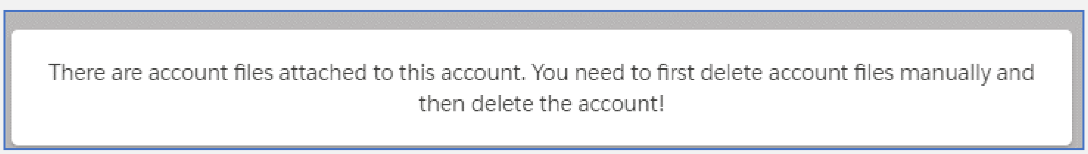


Figure 117

4. Case Files

After installing S-Drive, if you made the configuration correctly you'll be able to create case files in "Case " tab for each case easily. Go to your "Case " 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. Otherwise please consult to the "S-Drive Installation Guide" to activate "Case Files" section.

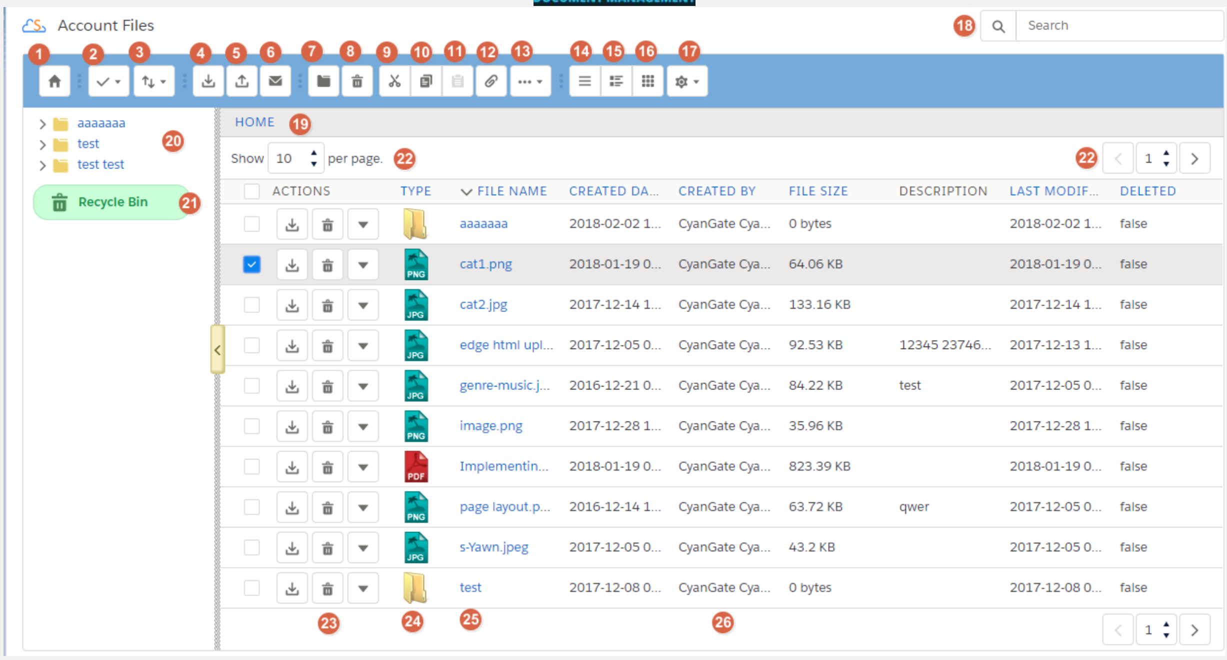


Figure 118

(1) "Home" button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) "Select All -Dropdown" button is used to *Select All* or *Deselect All* items in the list.

(3) "Sort -Dropdown" button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) "Download File(s)" button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) "Upload File(s)" button is used to upload file(s) to this case. See "Uploading Files" section for more information. This item is not displayed for the "Search Results View".

(6) "Email Files" button is used to email files. See "Emailing Files" section for more information.

(7) "Create New Folder" button is used to create folders. See "Creating Folders" section for more information. When you click on this button **"Create New Folder"** screen pops up. This item is not displayed for the "Search Results View".

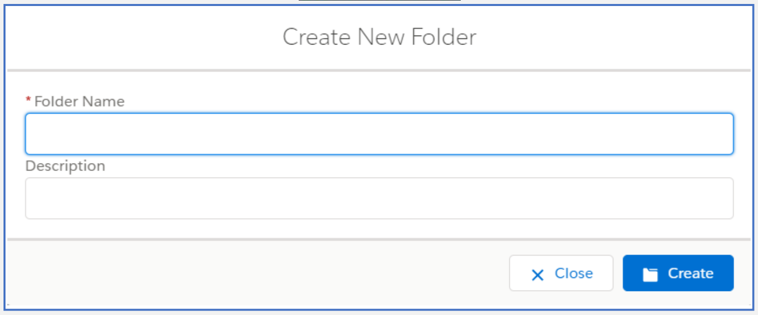


Figure 119

(8) "Delete Selected File(s)" button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information.

(9) "Cut" button is used to move file(s) between folders. See "Moving Files" section for more information.

(10) "Copy" button is used to copy file(s) between folders. See "Copying Files" sections for more information.

(11) "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. This item is not displayed for the "Search Results View".

(12) "**Attach From S-Drive"** button is used to attach files from S-Drive Folders to this case. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. 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.

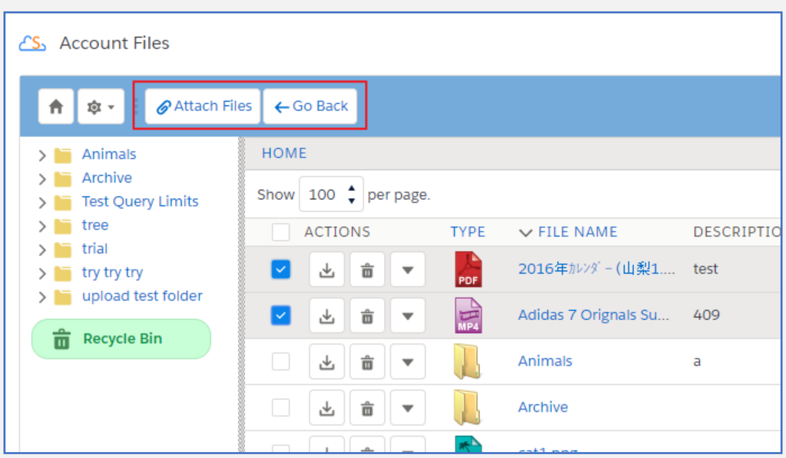


Figure 120

After completion of the attach process, you'll be asked: " You have successfully attached file(s) from S-Drive. Are you done attaching file(s) from S-Drive?" If you select "Yes", message will be closed, and you'll be redirected to the case page. "No" button will return you to Attach From S-Drive screen.

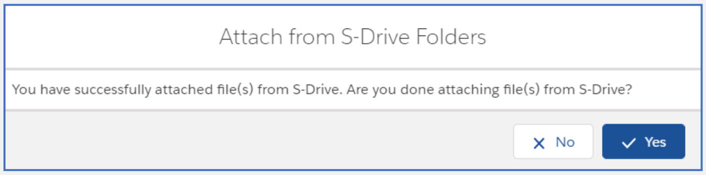


Figure 121

(13) "Custom Actions" button is used to perform different custom actions. See "Custom Actions" section in "S-Drive Advanced Configuration Guide" for more information.

(14) It changes current view to **List** view. For more information, you can look at **View Types** section.

(15) It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(16) It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(17) By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel will not be shown.

(18) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information.

(19) "Breadcrumb Folder Navigation" 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 85). You can click any level to drill down to that subfolder.

(20) "Folder Tree View" displays your case's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(21) "Recycle Bin" button is used for navigating to the Recycle Bin of your Case Files. You can find more information about the Recycle Bin in "Deleting Files" section.

(22) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number. If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(23) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected case file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected case file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 89). This item menu action is only for files and not available for folders.

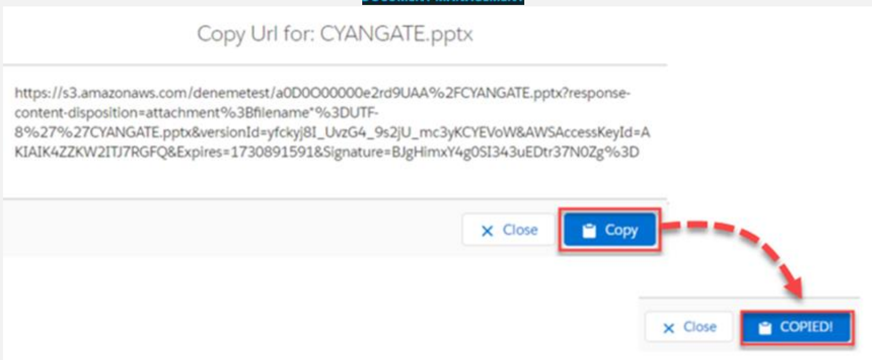


Figure 122

"Details" is used to open the details page of the selected case file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.

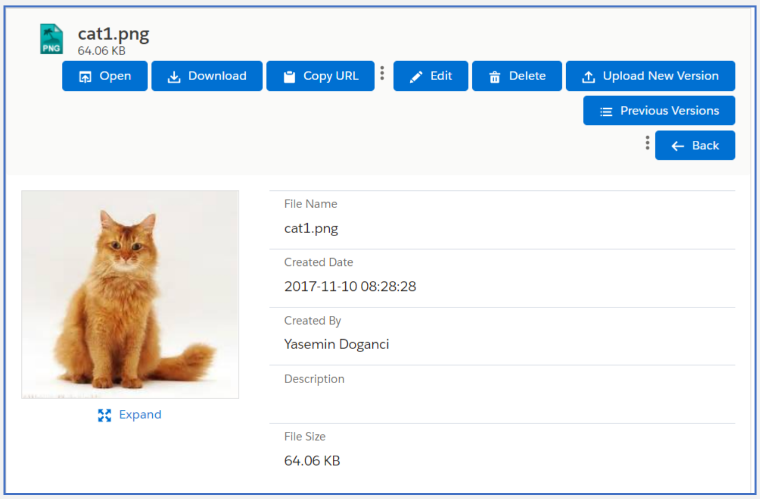


Figure 123

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 91) and you'll be able to edit current case file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.

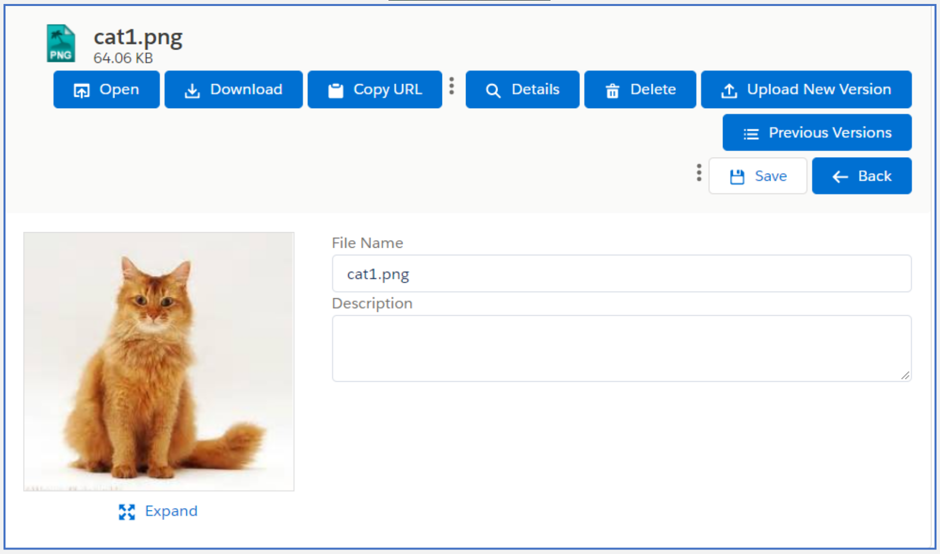


Figure 124

"Delete " is used to delete selected case file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

"Post to Chatter" is used to post comments/thoughts about a file to Salesforce Chatter. After clicking, a pop-up screen will appear, and you will be able to create a post or a poll, mention users, and share your thoughts about a file.

"Upload New Version": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files. Only HTML Upload Manager supports version upload.

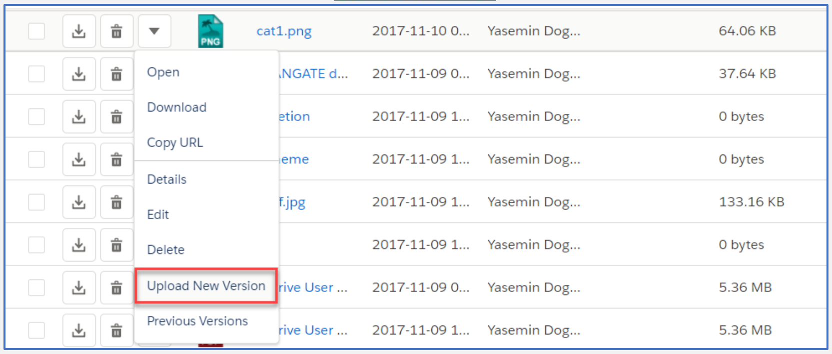


Figure 125

"Previous Versions": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files.

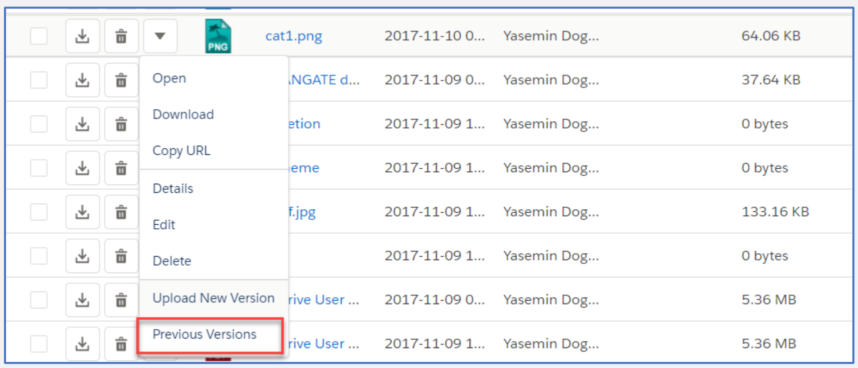


Figure 126

"Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file.

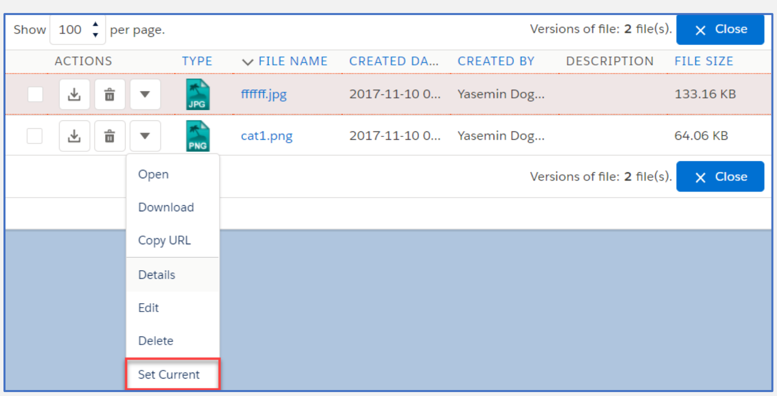


Figure 127

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(24) “Content Type Column” displays a type icon based on the content type of the case file/folder.

(25)"File Name Column" shows the file name information for the case files. You can sort files/folder ascending or descending by clicking the field header.

(26)"Customizable Field Columns" are used to display customizable fields. Your Salesforce.com case’s system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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. You need to delete case files first, and then you can delete the case.

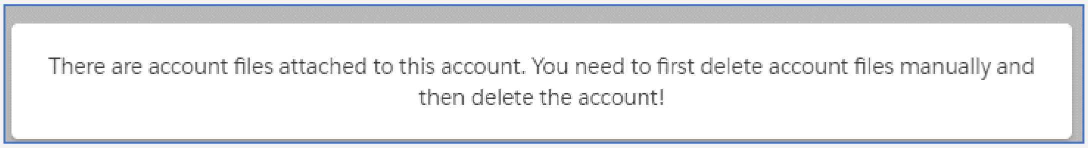


Figure 128

1. You can use "Case Files" feature from "Customer Portal" or “Community” also. After making required configuration for customer portal or community (See *S-Drive Advanced Configuration Guide* for more information), your customers can add case files to cases using "Customer Portal Interface" (Figure 129).

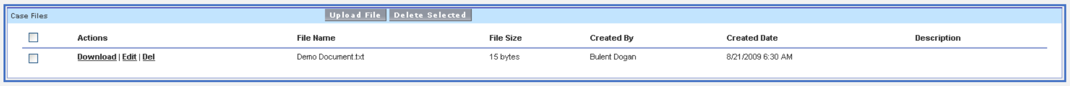


Figure 129

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 130). Otherwise please consult to the "*S-Drive Advanced Configuration Guide*" to activate "<Your Object Name> Files" section.

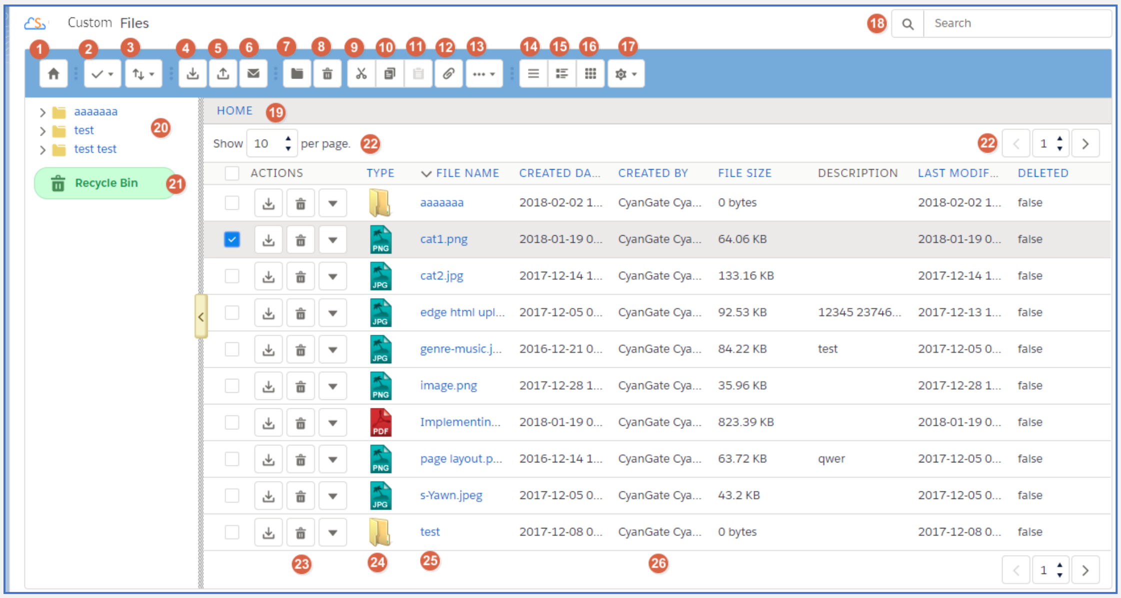


Figure 130

(1) **“Home”** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **“Select All -Dropdown”** button is used to *Select All* or *Deselect All* items in the list.

(3) **“Sort -Dropdown”** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s) to this custom object. See "Uploading Files" section for more information. This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information.

(7) "Create New Folder" button is used to create folders. See "Creating Folders" section for more information. When you click on this button **“Create New Folder”** screen pops up. This item is not displayed for the "Search Results View".

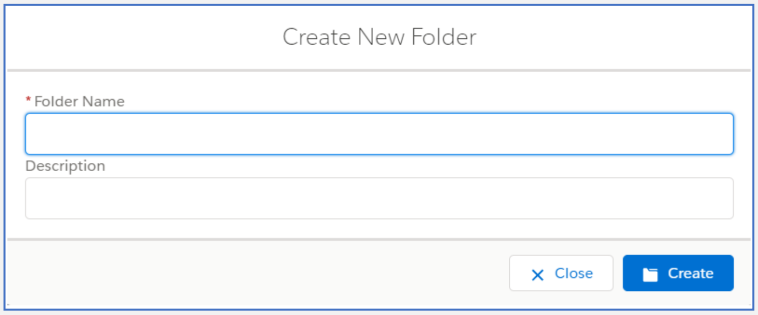


Figure 131

(8) "Delete Selected File(s)" button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information.

(9) "Cut" button is used to move file(s) between folders. See "Moving Files" section for more information.

(10) "Copy" button is used to copy file(s) between folders. See "Copying Files" sections for more information.

(11) "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. This item is not displayed for the "Search Results View".

(12) “**Attach From S-Drive”** button is used to attach files from S-Drive Folders to this custom object. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. 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.

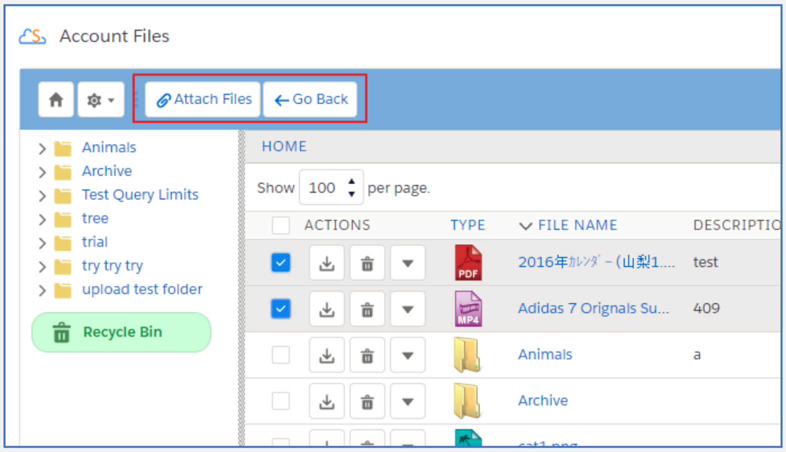


Figure 132

After completion of the attach process, you'll be asked: " You have successfully attached file(s) from S-Drive. Are you done attaching file(s) from S-Drive?" If you select "Yes", message will be closed, and you'll be redirected to the custom object page. "No" button will return you to Attach From S-Drive screen.

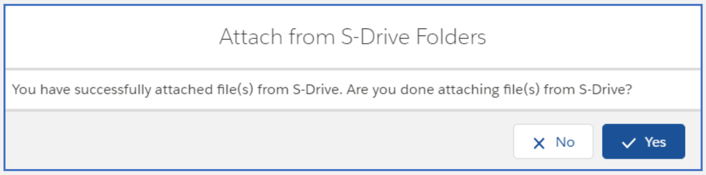


Figure 133

(13) "Custom Actions" button is used to perform different custom actions. See "Custom Actions" section in "S-Drive Advanced Configuration Guide" for more information.

(14)  It changes current view to **List** view. For more information, you can look at **View Types** section.

(15)  It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(16)  It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(17)  By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide

Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel will not be shown.

(18) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information.

(19) "Breadcrumb Folder Navigation" 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 85). You can click any level to drill down to that subfolder.

(20) "Folder Tree View" displays your custom object's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(21) "Recycle Bin" button is used for navigating to the Recycle Bin of your Custom Object Files. You can find more information about the Recycle Bin in "Deleting Files" section.

(22) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number. If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(23) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

“Open” is used to open the selected custom object file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected custom object file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer’s “Downloads” folder.

"Copy URL” is used to copy the URL of the selected custom object file. After clicking this link, a popup will appear along with the URL of the selected file (Figure 89). This item menu action is only for files and not available for folders.

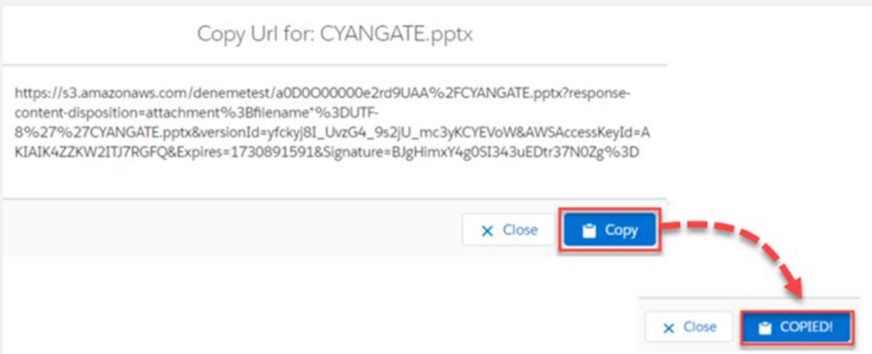


Figure 134

“Details” is used to open the details page of the selected custom object file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.

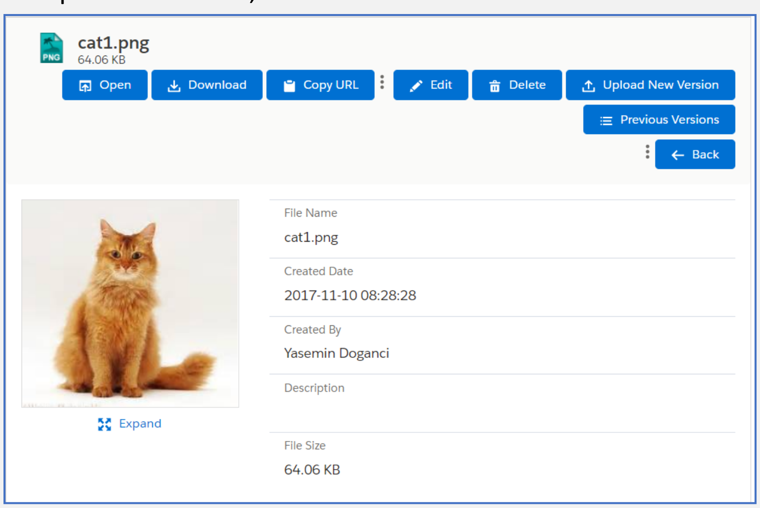


Figure 135

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 91) and you'll be able to edit current custom object file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.

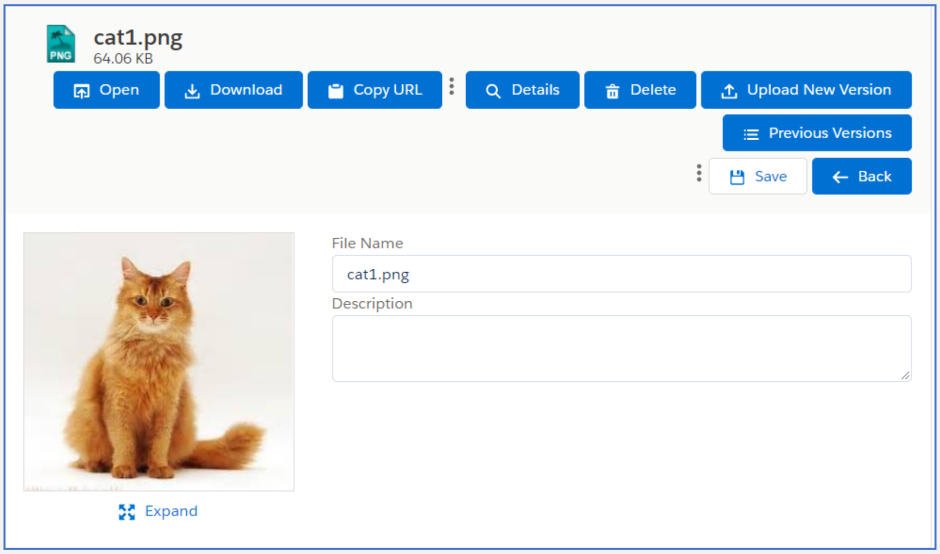


Figure 136

"Delete " is used to delete selected custom object file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

"Post to Chatter" is used to post comments/thoughts about a file to Salesforce Chatter. After clicking, a pop-up screen will appear, and you will be able to create a post or a poll, mention users, and share your thoughts about a file.

"Upload New Version": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files. Only HTML Upload Manager supports version upload.

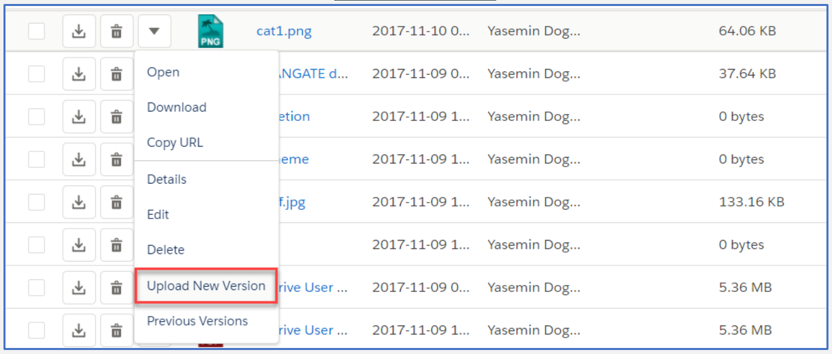


Figure 137

"Previous Versions": *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can see previous versions of file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files.

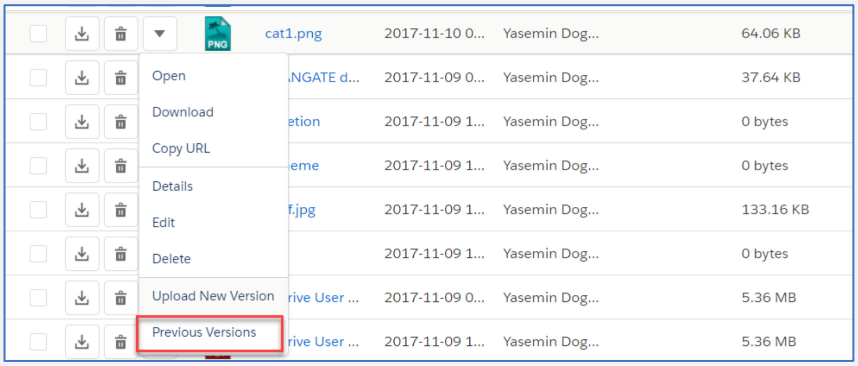


Figure 138

"Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file.

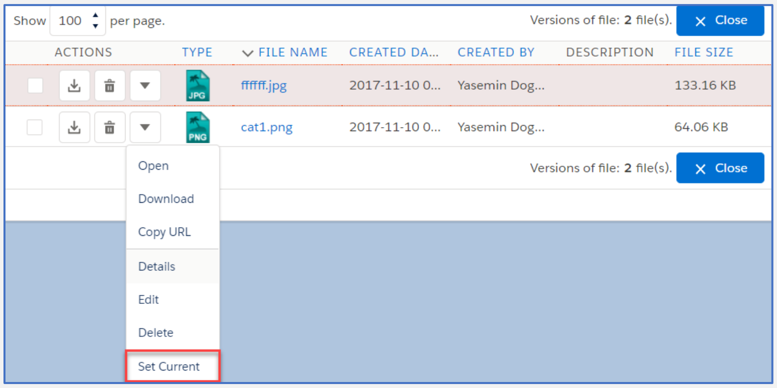


Figure 139

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(24) “Content Type Column” displays a type icon based on the content type of the custom object file/folder.

(25)"File Name Column" shows the file name information for the custom object files. You can sort files/folder ascending or descending by clicking the field header.

(26)"Customizable Field Columns" are used to display customizable fields. Your Salesforce.com custom object’s system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

1. **"Customizable Field Columns"** are used to display customizable fields (Figure 130-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

Notes

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 140). You need to delete object files first, and then you can delete the object.

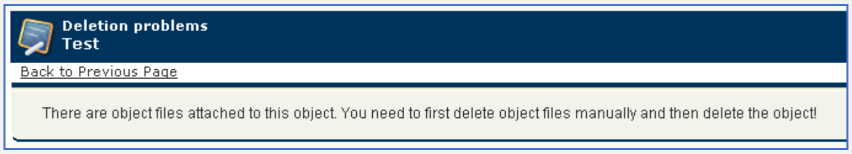


Figure 140

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".

Z. S-Drive Advanced Search

S-Drive Advanced Search is a new feature of S-Drive that helps to perform improved search functionality in object files. AdvancedSearchPage and AdvancedSearchComponent created for that. You can use AdvancedSearchComponent with your own VF pages. You can access to this feature using S-Drive Advanced Search tab.

1. Searching Files

S-Drive Advanced Search needs following criteria to perform a search;

- **Object:** This represents the S-Drive Object to select. Search will be performed on selected object. E.g. Account, Case.
- **Object File:** This represents the S-Drive Object File to select. Search will be performed on selected object file. E.g. Account File, Case File.
- **Parent Object Field (Optional):** This represents a field of selected parent S-Drive object. If you select a parent object field, you can see that in Results table. E.g. Case Number, Origin.
- **Search Keyword:** This represents the keyword to perform a search. Search will be performed in all fields of selected object file for entered keyword.

You can click on the “Search” button to perform a search. After a successful search, the results will be displayed on screen (Figure 141).

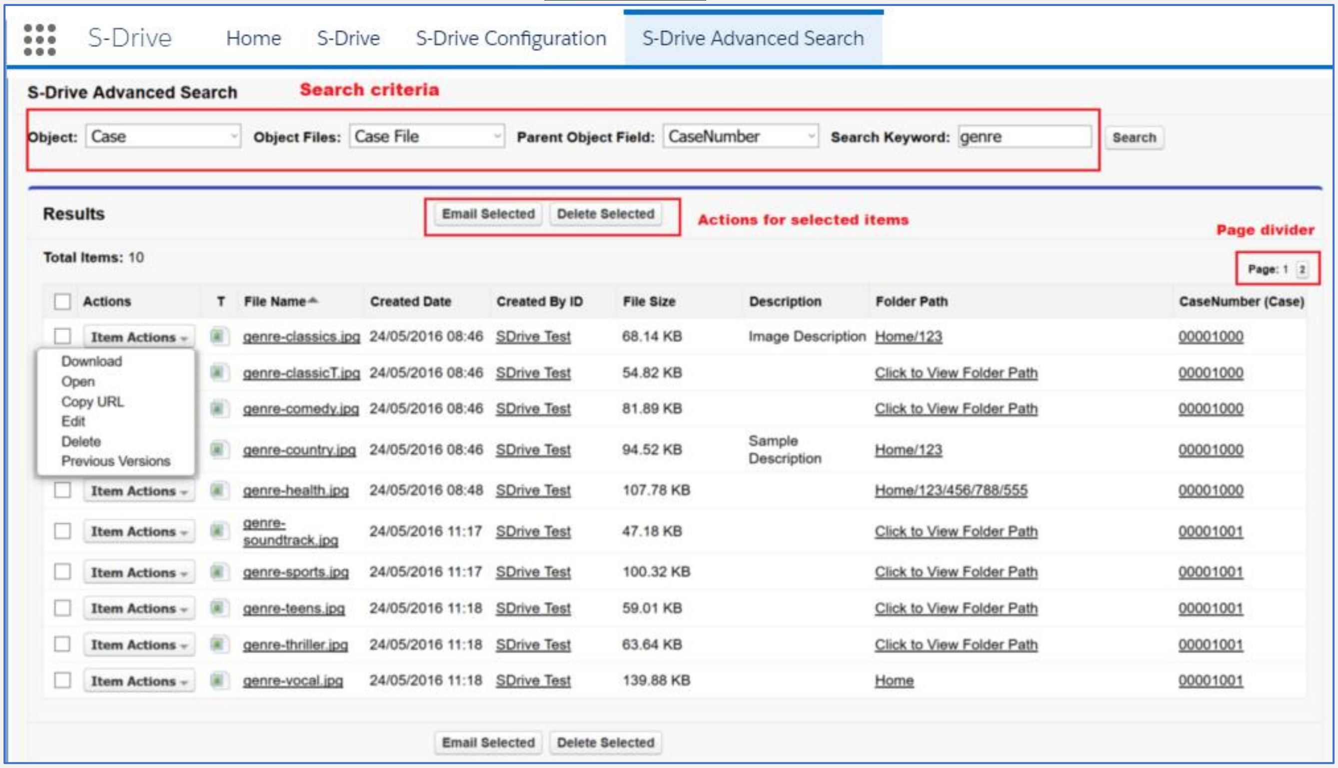


Figure 141

Item Actions

1- Downloading Files

You can download a file by clicking **"Download"** item menu action under the "Item Actions" button (Figure 142).

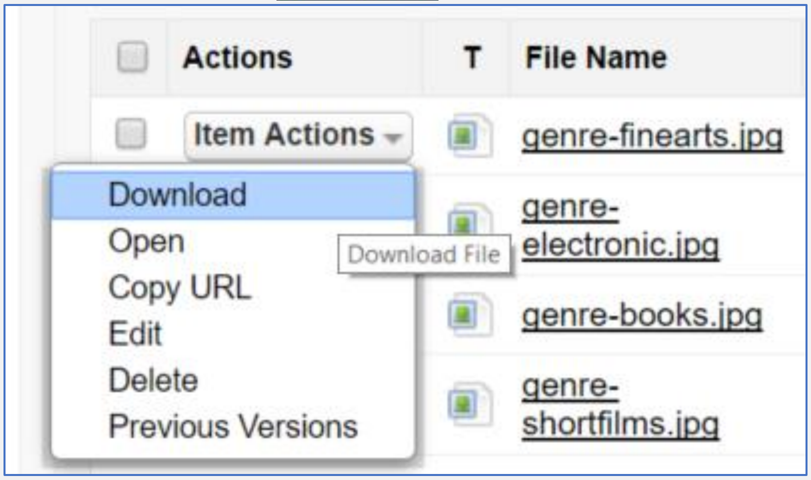


Figure 142

2- Opening Files

You can open a file by clicking **"Open"** item menu action under the "Item Actions" button (Figure 143).

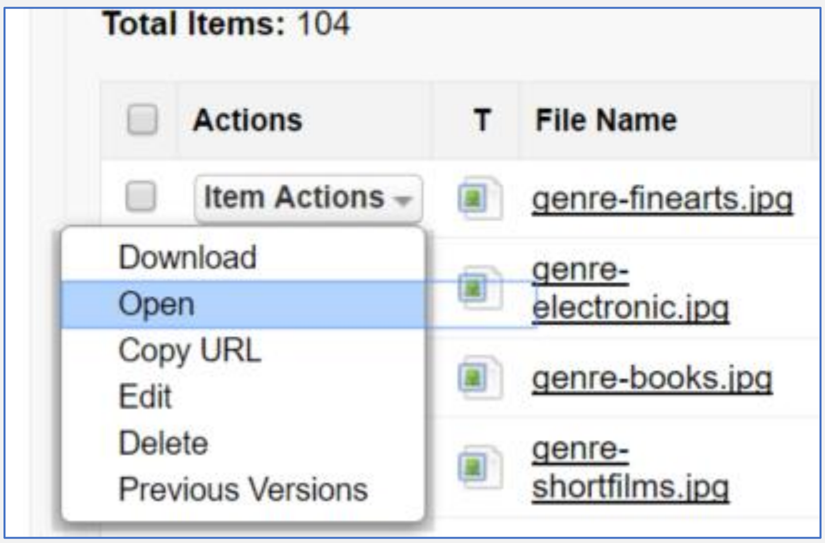


Figure 143

3- Copy URL

You can Copy URL of a file by clicking **"Copy URL"** item menu action under the "Item Actions" button (Figure 144). After clicking Copy URL, you can select full URL and copy it (Figure 145).

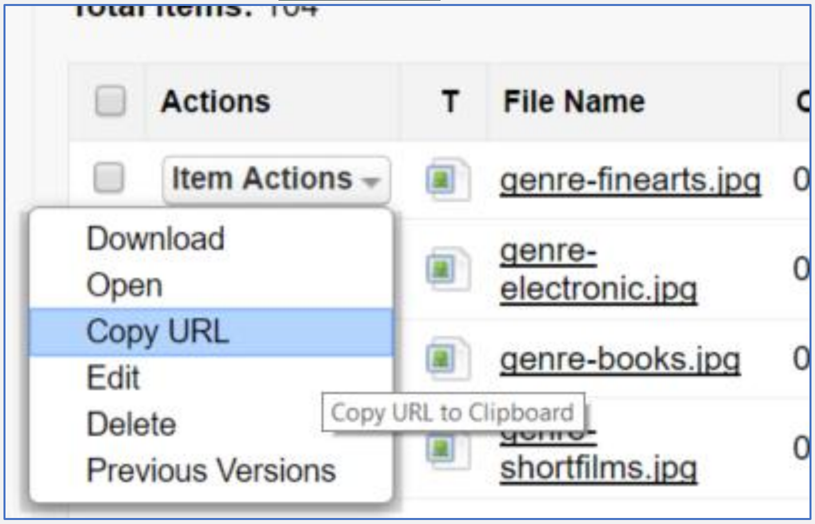


Figure 144

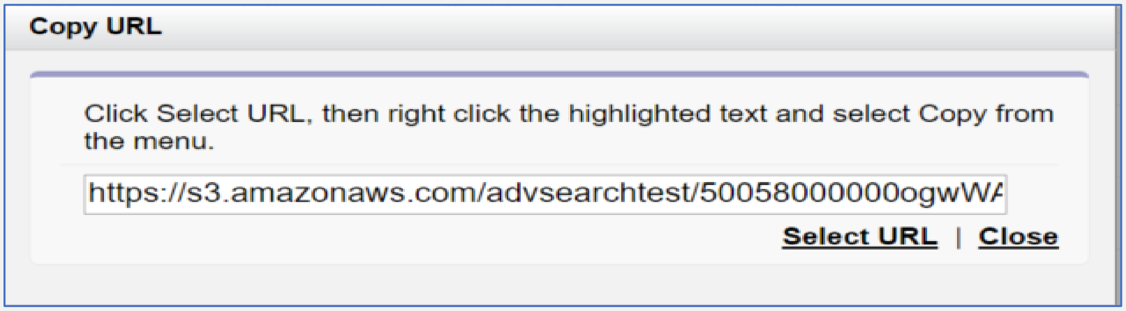


Figure 145

4- Editing Files

You can edit a file by clicking **"Edit"** item menu action under the "Item Actions" button (Figure 146). After clicking Edit, you can edit Description of file and save it. (Figure 147).

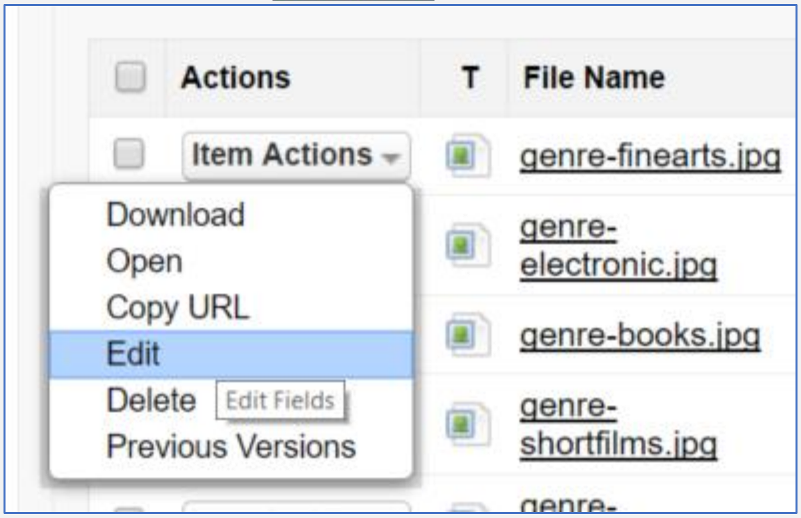


Figure 146

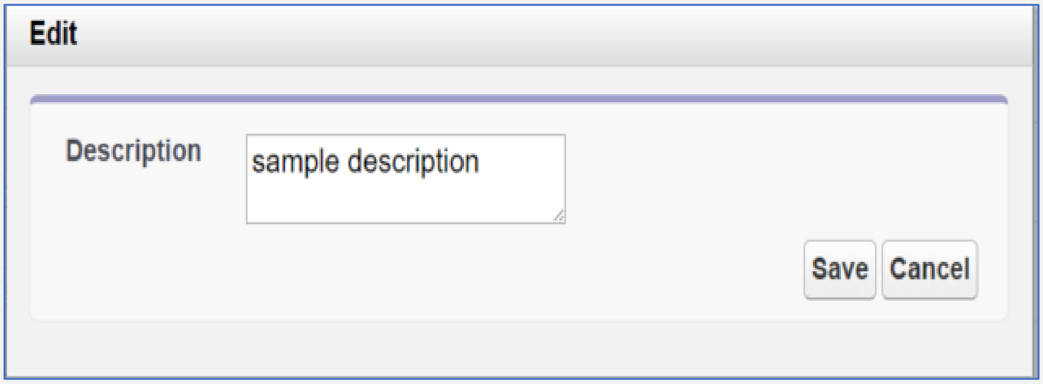


Figure 147

Notes

1. If versioning is enabled and if you are displaying previous versions, you can also edit version description for version files.

5- Deleting Files

You can delete a file by clicking **"Delete"** item menu action under the "Item Actions" button (Figure 148).

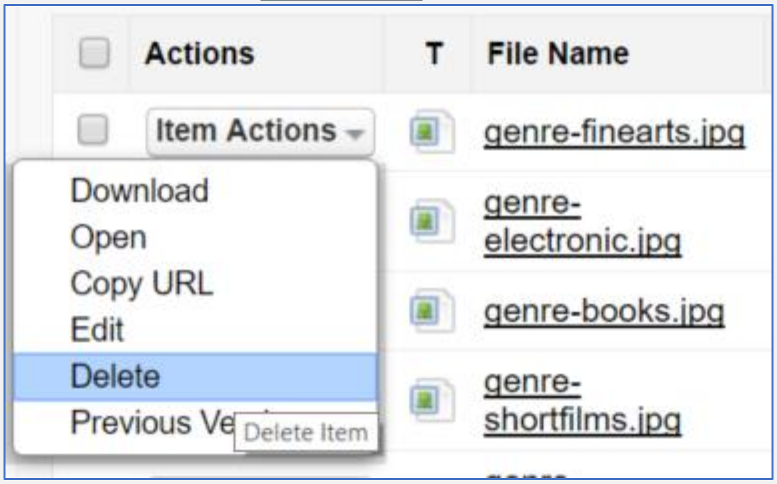


Figure 148

Notes

1. If versioning is enabled and if you delete latest version, all previous versions will also be deleted.

6- Previous Versions

You can display previous versions of files by clicking **"Previous Versions"** item menu action under the "Item Actions" button (Figure 149). After clicking on it, version history of the file will be listed (Figure 150).

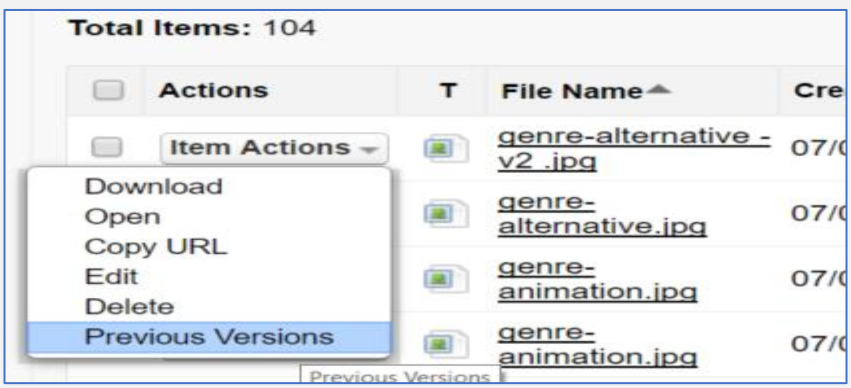
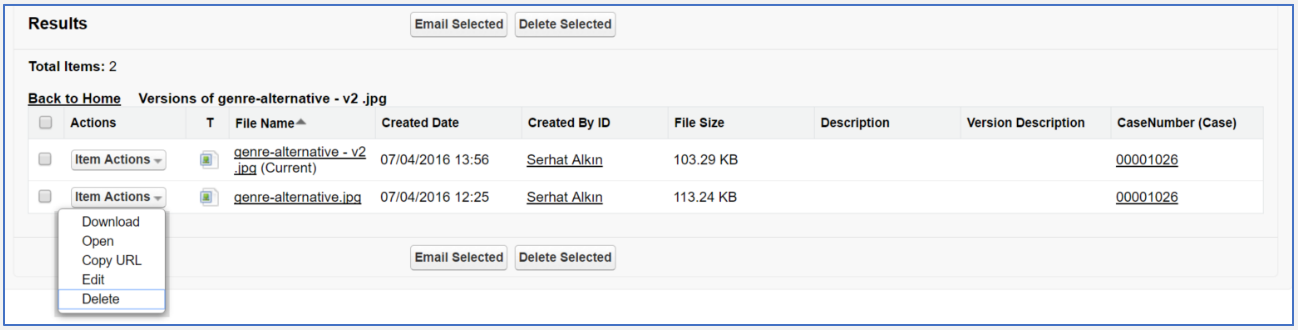


Figure 149



Results | Email Selected | Delete Selected

Total Items: 2

Back to Home   Versions of genre-alternative - v2 .jpg

	Actions	T	File Name	Created Date	Created By ID	File Size	Description	Version Description	CaseNumber (Case)
	Item Actions		genre-alternative - v2 .jpg (Current)	07/04/2016 13:56	Serhat Alkın	103.29 KB			00001026
	Item Actions		genre-alternative.jpg	07/04/2016 12:25	Serhat Alkın	113.24 KB			00001026

Download
Open
Copy URL
Edit
Delete

Email Selected | Delete Selected

Figure 150

You can also Download, Open, Copy URL, Edit and Delete version files.

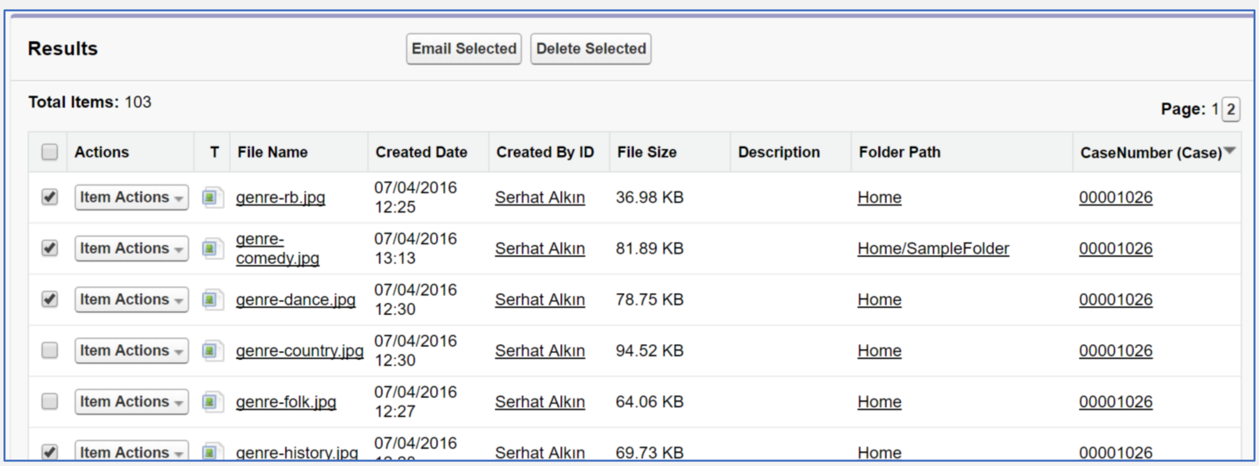
Notes

1. You can edit Description and Version Description in "Previous Versions" screen. Also, if you delete Current Version on this screen, most recent file will be set as current.

Email Selected and Delete Selected

You can select one or multiple files by using checkboxes in results table and you can Email these files by clicking "Email Selected" button (Figure 151).

You can select one or multiple files by using checkboxes in results table and you can Delete these files by clicking "Delete Selected" button (Figure 151).



Results | Email Selected | Delete Selected

Total Items: 103   Page: 1 2

	Actions	T	File Name	Created Date	Created By ID	File Size	Description	Folder Path	CaseNumber (Case)
✔	Item Actions		genre-rb.jpg	07/04/2016 12:25	Serhat Alkın	36.98 KB		Home	00001026
✔	Item Actions		genre-comedy.jpg	07/04/2016 13:13	Serhat Alkın	81.89 KB		Home/SampleFolder	00001026
✔	Item Actions		genre-dance.jpg	07/04/2016 12:30	Serhat Alkın	78.75 KB		Home	00001026
	Item Actions		genre-country.jpg	07/04/2016 12:30	Serhat Alkın	94.52 KB		Home	00001026
	Item Actions		genre-folk.jpg	07/04/2016 12:27	Serhat Alkın	64.06 KB		Home	00001026
✔	Item Actions		genre-history.jpg	07/04/2016	Serhat Alkın	69.73 KB		Home	00001026

Figure 151

Navigation

You can display the Folder Path of a file by clicking on the “Click to View Folder Path” link and then you can click on the Folder Path to navigate to this folder in a new tab. You can also click on the Parent Object Field (E.g CaseNumber) to navigate to this parent record in a new tab (Figure 152). “Previous Versions” screen doesn’t support “Folder Path” column.

Actions	T	File Name	Created Date	Created By ID	File Size	Description	Folder Path	CaseNumber (Case)
Item Actions		genre-classics.jpg	24/05/2016 08:46	SDrive Test	68.14 KB	Image Description	Home/123	00001000
Item Actions		genre-classicT.jpg	24/05/2016 08:46	SDrive Test	54.82 KB		Click to View Folder Path	00001000

Figure 152

2. Configuring S-Drive Advanced Search Component

S-Drive Advanced Search feature has been designed as dynamic and reusable. So, you can configure AdvancedSearchComponent. Below, you can see the attributes of AdvancedSearchComponent;

<apex:attribute name="searchCriteria" description="Criteria of the search." access="global" type="String" required="required" assignTo="{!searchCriteriaAT}"/>

<apex:attribute name="customObjectName" description="API Name of the custom object that the files will belong to. This object can also be one of the standard objects such as Solutions or Products. For example: 'MyObject__c' or 'Solution'" access="global" type="String" required="required" assignTo="{!customObjectNameAT}"/>

<apex:attribute name="customField" description="This represents a field of parent S-Drive object. If you pass a parent object field, you can see this field in Results table. E.g. Case Number, Origin." access="global" type="String" required="required" assignTo="{!customFieldAT}"/>

<apex:attribute name="customObjectFileName" description="API Name of the custom object that will represent the file. This custom file object is required to include fields indicated in the installation guide of S-Drive. For example: 'MyFile__c'" access="global" type="String" required="required" assignTo="{!customObjectFileNameAT}"/>

<apex:attribute name="fileNamespacePrefix" description="Namespace prefix for the file object. This attribute is required if the object has a namespace. For example: 'cg__'" access="global" type="String" required="optional" assignTo="{!fileNamespacePrefixAT}" default=""/>

<apex:attribute name="objectNamespacePrefix" description="Namespace prefix for the parent object for the attachments. This attribute is required if the object has a namespace. For example: 'cg__'" access="global" type="String" required="optional" assignTo="{!objectNamespacePrefixAT}" default=""/>

<apex:attribute name="relationshipName" description="Master-detail relation used for selected standard/custom object. For example: 'Parent__r'" access="global" type="String" required="required" assignTo="{!relationshipNameAT}" default=""/>

<apex:attribute name="orderBy" description="Name of the field that should be used to order the list of files. This attribute is optional and leaving this empty will not order the results in any specific order. For example: 'File_Name__c'" access="global" type="String" required="optional" assignTo="{!orderByAT}" default=""/>

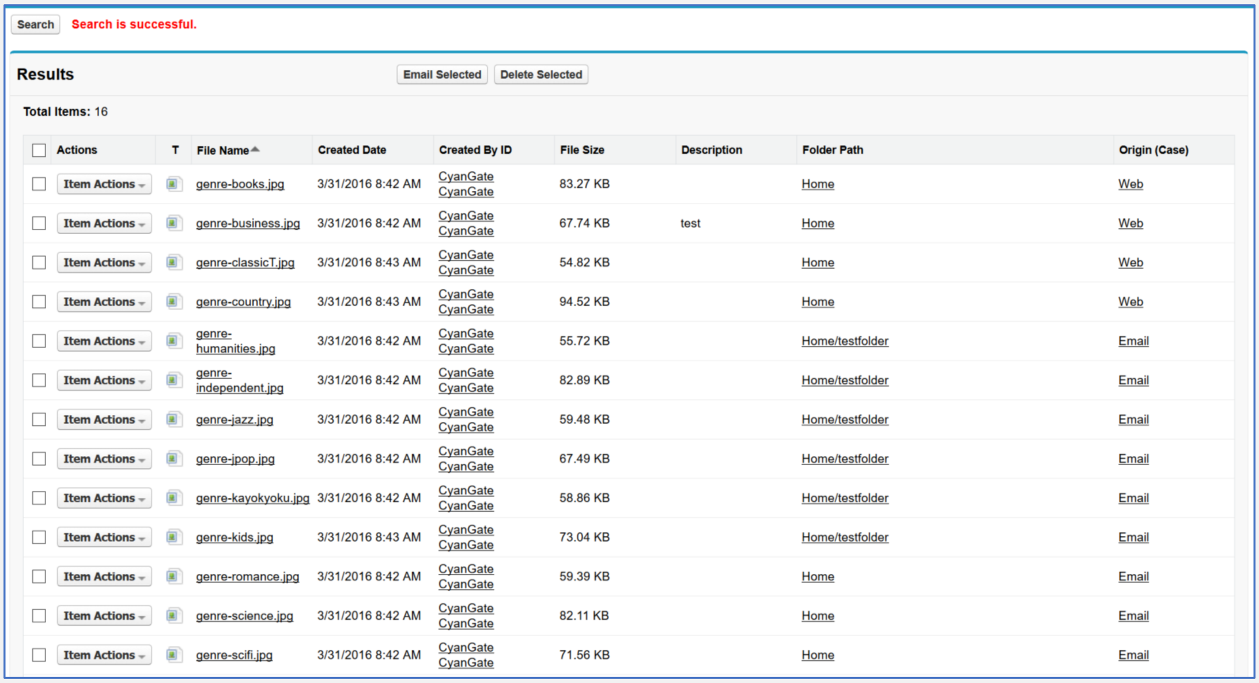
```
<apex:attribute name="pageSize" description="Page size for pagination. Attachment items will be paginated based on this value. This attribute is optional and default value is 100." access="global" type="Integer" required="optional" assignTo="{!pageSizeAT}" default="100"/>

</apex:component>
```

AdvancedSearchPage is used to pass customObjectName(Object), customObjectFileName(Object File), customField(Parent Object Field) and searchCriteria (Search Keyword) attributes into AdvancedSearchComponent using a user interface. You can embed AdvancedSearchComponent into a different VF Page, you can pass your info into component attributes.

Sample use of AdvancedSearchComponent in a VisualForce page;

```
<apex:page>

  <apex:form>

    <cg:AdvancedSearchComponent

                searchCriteria="genre"

                customField="Origin"

                customObjectName="Case"

                customObjectFileName="CaseFile__c"

                fileNamespacePrefix="cg__"

                objectNamespacePrefix="cg__"

                relationshipName="Case__r"

                orderBy="File_Name__c"

   />

  </apex:form>

</apex:page>
```

Sample Output (Figure 153);



Search Search is successful.

Results Email Selected Delete Selected

Total Items: 16

Actions	T	File Name	Created Date	Created By ID	File Size	Description	Folder Path	Origin (Case)
Item Actions		genre-books.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	83.27 KB		Home	Web
Item Actions		genre-business.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	67.74 KB	test	Home	Web
Item Actions		genre-classicT.jpg	3/31/2016 8:43 AM	CyanGate CyanGate	54.82 KB		Home	Web
Item Actions		genre-country.jpg	3/31/2016 8:43 AM	CyanGate CyanGate	94.52 KB		Home	Web
Item Actions		genre-humanities.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	55.72 KB		Home/testfolder	Email
Item Actions		genre-independent.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	82.89 KB		Home/testfolder	Email
Item Actions		genre-jazz.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	59.48 KB		Home/testfolder	Email
Item Actions		genre-jpop.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	67.49 KB		Home/testfolder	Email
Item Actions		genre-kayokyoku.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	58.86 KB		Home/testfolder	Email
Item Actions		genre-kids.jpg	3/31/2016 8:43 AM	CyanGate CyanGate	73.04 KB		Home/testfolder	Email
Item Actions		genre-romance.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	59.39 KB		Home	Email
Item Actions		genre-science.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	82.11 KB		Home	Email
Item Actions		genre-scifi.jpg	3/31/2016 8:42 AM	CyanGate CyanGate	71.56 KB		Home	Email

Figure 153

AA. 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 154)

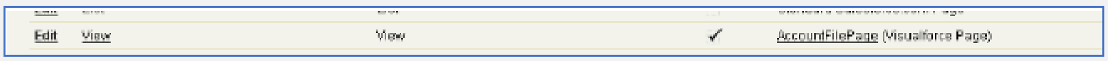


Figure 154

2. Upload a jpg image file into one of your accounts using Upload File(s) button. (Figure 155)

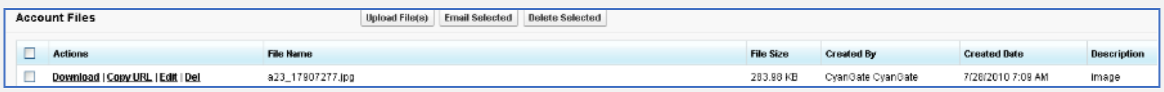


Figure 155

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 156)

Figure 156

```
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 157)

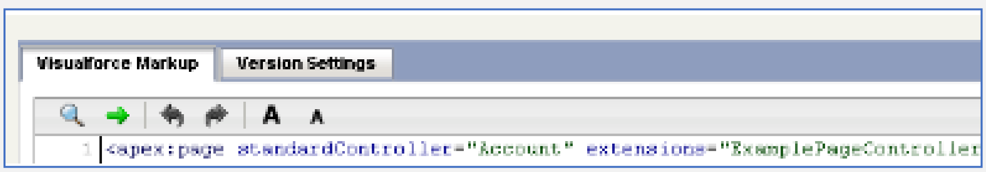


Figure 157

```
<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 158)

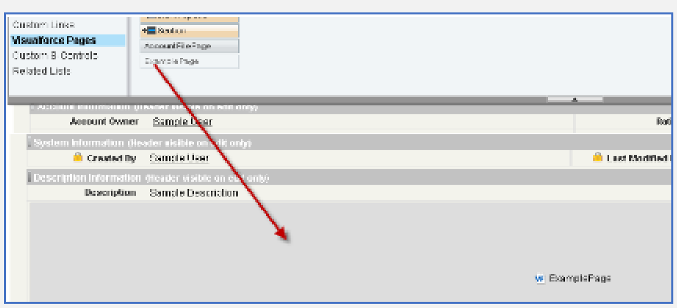


Figure 158

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 159)

Figure 159

Notes

1. If you would like to get an old version of a file, you should add id of an old version file into fileoObjectIds list.

b. 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)

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

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 theirs 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

requestParametersList: List of request parameters map for each files.

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

Notes

1. If you would like to get an old version of a file, you should add id of an old version file into fileoObjectIds list.

c. 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.

d. getAccessKey()

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

```
String getAccessKey()
```

e. getBucketName()

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

```
String getBucketName()
```

f. getS3Endpoint()

This method is used to get the S3 Endpoint location of your S3 bucket for setting the S3 *endpoint* parameter during uploads.

```
String getS3Endpoint()
```

g. 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 161) which holds delete status information for each file record.

Example code:

```
List<Id>wipIds = new List<Id>();

wipIds.add(ID.valueOf(uploadRequestInfos .fileWipId));

List<cg.ResultObject>resultObjects = cg.SDriveTools.deleteFiles(wipIds, objectId);
```

Notes

1. If you enable versioning and add a latest version file id into wipIds list, all versions of that file will also be deleted. You can also delete a single old version file by adding its id into wipId list.

h. 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 theirs 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 160), which holds information about the files that are about to be uploaded.

The following steps are executed within this method:

a. Validate the input with the following rules:
   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.

1. Create the file record in Salesforce with work in progress state (WIP__c = true) (i.e. create S3Object, Case File, Custom Object File, etc).
2. 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 162 and Returns a list of UploadRequestInfo (Figure 160) 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 = 'a0I80...';

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 );
```

Notes

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* and x-*amz-server-side-encryption 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 163.

i. 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 Result Object (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);
```

j. 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>**wipIds** = new List<Id>();

wipIds.add(ID.valueOf(**uploadRequestInfos** .fileWipId));

List<cg.ResultObject>**resultObjects** = cg.SDriveTools.cancelUpload(**wipIds**, **objectId**);

k. 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);

l. initializeMultiPartUpload()

This method is used to initialize multipart upload to get uploadId. This uploadId will be used on copy part, complete, abort multi part operations.

```
String initializeMultiPartUpload(String awsLocation)
```

Parameters:

awsLocation: The name of key to be uploaded as file location. You can get this value from the fileLocation of UploadRequestInfo object.

Return Value: The method will return the uploadId as a String.

Example code:

```
String  uploadId = cg.SDriveTools.initializeMultiPartUpload(uploadRequestInfos .fileLocation);
```

m. copyPartMultiPartUpload()

This method is used to upload a part by copying data from existing object as data source to get Etag value. This Etag will be used complete multi part request.

```
String copyPartMultiPartUpload(String awsLocation, String uploadId, Long
partNumber)
```

Parameters:

awsLocation: The name of key to be uploaded as file location. You can get this value from the fileLocation of UploadRequestInfo object.

uploadId: The upload Id that you get this Id from the initializeMultipartUpload request as a return value.

partNumber: The order of uploaded part.

Return Value: The method will return the Etag as a String.

Example code:

```
List<String> eTagList = new List <String>();
for(Integer i = 1; i<= multiPartsSize; i++)
{
    String  eTag = cg.SDriveTools.copyPartMultiPartUpload(uploadRequestInfos .fileLocation,
    uploadId, i);
     eTagList.add(eTag);
}
```

Notes

1. While uploading multi parts, you must give the *key* parameters with below format. It must be start with zero.

"key" : *fileLocation* + **'.'** +0   (partNumber = 1)

to

"key" : *fileLocation* + **'.'** + multiPartsSize-1   (partNumber = multiPartsSize)

n. completeMultiPartUpload()

This method is used to complete a multipart.

```
String completeMultiPartUpload(String awsLocation, String uploadId,
List<String> eTagList)
```

Parameters:

awsLocation: The name of key to be uploaded as file location. You can get this value from the fileLocation of UploadRequestInfo object.

uploadId: The upload Id that you get this Id from the initializeMultipartUpload request as a return value.

eTagList: List of Etags. You can get Etags by copyPartMultiPart requests.

Return Value: The method will return the ETag as a String.

Example code:

```
String  ETag = cg.SDriveTools.completeMultiPartUpload(uploadRequestInfos .fileLocation,
uploadId,  eTagList);
```

o. deleteMultiParts()

This method is used to delete multi parts.

```
void deleteMultiParts(String awsMultiPartsLocationList)
```

Parameters:

awsMultiPartsLocationList: List of parts keys as the names of file locatons. It must contain up to 1000 keys because of limit.

Example code:

```
List<String> awsMultiPartsLocationList = new List <String>();
for(Integer i = 0; i<= multiPartsSize-1; i++)
{
  awsMultiPartsLocationList.add( fileLocation + '.' +i );
}

cg.SDriveTools.deleteMultiParts(awsMultiPartsLocationList);
```

p. abortMultiPartUpload()

This method is used to abort a multipart upload.

```
void abortMultiPartUpload(String awsLocation, String uploadId)
```

Parameters:

awsLocation: The name of key to be uploaded as file location. You can get this value from the fileLocation of UploadRequestInfo object.

uploadId: The upload Id that you get this Id from the initializeMultipartUpload request as a return value.

Example code:

cg.SDriveTools.abortMultiPartUpload(**uploadRequestInfos** .fileLocation, **uploadId**);

q. inheritSharings()

This method is used to inherit the sharings from parent folder to the file.

```
void inheritSharings(List<String> wipIdList, String currentFolderId)
```

Parameters:

wipIdList: List of Salesforce.com IDs of "file" records(either attachments or S-Drive Folder files) as a String.

currentFolderId: Id of the parent folder of the file for sharing.

Example code:

List<String> wipIdList = new List <String>();
wipIdList .add(**uploadRequestInfos** .fileWipId);
cg.SDriveTools.inheritSharings(wipIdList, currentFolderId);

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 160

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 161

r. 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()
- getS3Endpoint()

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 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 getS3Endpoint() 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.

You can also upload the big files using multipart uploads. For this, you will need below methods.

- initializeMultiPartUpload()
- copyPartMultiPartUpload()
- completeMultiPartUpload()

- deleteMultiParts()
- abortMultiPartUpload()

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"},
]
}
```

Figure 162

a) Exceptions and Reasons for Upload Operations

1. **[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 S3Object.
   [Solution] Give the parent folder ids the same for all S3Objects.

2. **[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 S3Objects.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 namebutithasbeenuploadedbyanotheruserlessthan12 hours ago.
   [Solution]Upload files with different file names or delete the previously existing files before the upload.

3. **[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.

4. **[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 spaceor 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: \ / : * ? \" < > | ~

5. **[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.

6. **[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-characterSalesforce.com ID as objectId parameter.

b) Error Messagesof *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 than0 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-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 163).

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

Figure 163

s. getPreviewURL()

This method is used to get the URL of an S-Drive Attachment's Preview File.

```
String getPreviewURL(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.

timeValue: Expiration time of the link in seconds.

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

Notes

1. If you would like to get preview URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

t. getPreviewURLs()

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

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

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

List<String> getPreviewURLs(List<ID> parentIds, List<ID>
  fileObjectIds, Long timeValue, List<Map<String,String>>
   requestParametersList)
```

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 theirs 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

requestParametersList: List of request parameters map for each files.

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

Notes

1. If you would like to get preview URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

u. getThumbnailURL()

This method is used to get the URL of an S-Drive Attachment's Thumbnail File.

```
String getThubmnailURL(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.

timeValue: Expiration time of the link in seconds.

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

Notes

1. If you would like to get thumbnail URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

v. getThumbnailURLs()

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

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

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



```
List<String> getThumbnailURLs(List<ID> parentIds, List<ID>
  fileObjectIds, Long timeValue, List<Map<String,String>>
   requestParametersList)
```

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 theirs 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

requestParametersList: List of request parameters map for each files.

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

Notes

1. If you would like to get thumbnail URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

BB. 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: sdriveapp.com/support
2. Email: sdrive@sdriveapp.com

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