



# S-Drive User Guide v2.1

## ***Important Note***

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



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## A. S-Drive Folders Screen

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

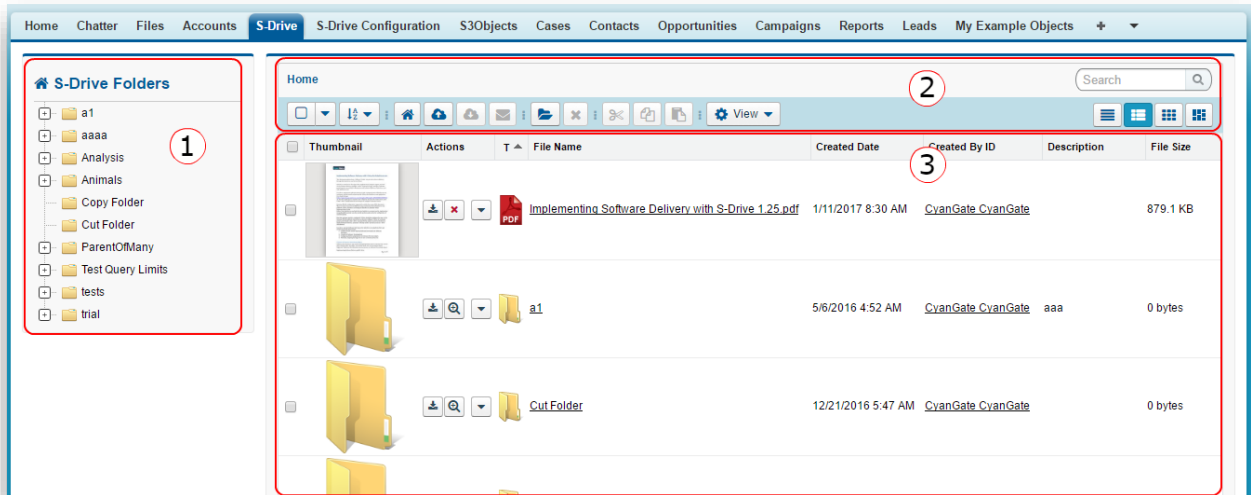


Figure 1

### 1. 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 files and folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will have a plus sign (+) next to its name. After opening that folder, plus sign becomes a minus sign (-). You can open-close folders using these signs also.

### 2. Toolbar

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

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

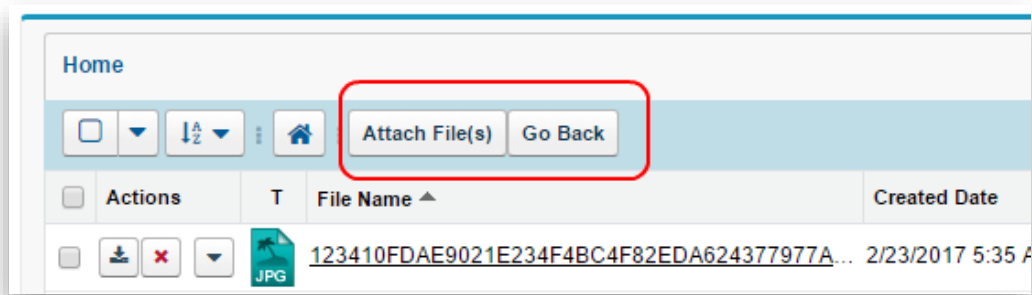


Figure 2

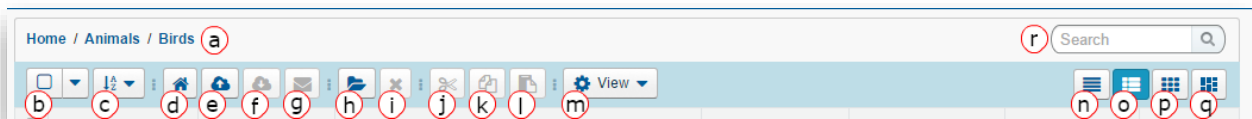


Figure 3

- (a) **"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 3-a). You can click any level to drill down to that subfolder. Once a search is performed, search results are displayed in "Search Results View" and "Current Folder Information Holder" becomes "Back to Home" link (Figure 4). You can click to this link to go back to Home page.

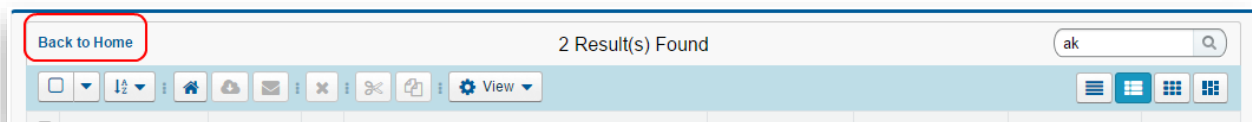


Figure 4

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





- (d) **"Home"** button is functioning same as "Home" link on breadcrumb navigation. It directs to root folder of S-Drive Folders.
- (e) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 3-e). This item is not displayed for the "Search Results View".
- (f) **"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 a folder selected, it creates a zip file and download it.
- (g) **"Send Email"** button is used to email files. See "Emailing Files" section for more information (Figure 3-g).
- (h) **"Create Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 3-h). This item is not displayed for the "Search Results View".
- (i) **"Delete File(s)"** button is used to delete file(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 3-i).
- (j) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 3-j).
- (k) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 3-k).
- (l) **"Paste"** button is used to paste the copied or cut file(s) to a folder. This button is not visible until files are selected for cut/copy. See "Moving Files" and "Copying Files" sections for more information (Figure 3-l). This item is not displayed for the "Search Results View".
- (m) By **"View Settings"** dropdown menu button, you can set default View Type of S-Drive Folders page and default Sort Field and direction of File List.
  - a. **"Set [current] View as default View Type"**: If this item selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected

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**NOTE:** (n), (o), (p), and (q) are view type selection buttons. These buttons are not active for users who don't use "Preview & Thumbnail" feature. For more information you can look at View Types section.

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view type in default.

- b. **"Set [current field] [order] as default Sort Field"**: If this item selected, it saves current sort field and direction to settings. When S-Drive page is opened, *File List* is ordered by selected field and selected direction.
- (n)  It changes current view to **List** view. For more information, you can look at **View Types** section.
- (o)  It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.
- (p)  It changes current view to **Grid** view. For more information, you can look at **View Types** section.
- (q)  It changes current view to **Card** view. For more information, you can look at **View Types** section.
- (r) **"Search Box"** is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 3-r).

## B. View Types

### A. List View

List view is default S-Drive view for all users. There isn't any thumbnail or preview image for this view type. Text information listed on the regular table. (Figure 5)





































Actions	T	File Name ^	Created Date	Created By ID	Description	File Size
  		11105313LM.jpg	1/18/2017 2:47 AM	CyanGate CyanGate		347.43 KB
  		ArrangementPlanDetails_ODT.odt	1/18/2017 2:47 AM	CyanGate CyanGate		457.96 KB
  		CYBERPARK Ekim 2016.xlsx	1/18/2017 2:47 AM	CyanGate CyanGate		53.42 KB
  		Deepest_Purple.jpg	1/24/2017 6:18 AM	CyanGate CyanGate		70.73 KB
  		Docs	2/7/2017 6:43 AM	CyanGate CyanGate		0 bytes
  		enable.png	3/15/2017 8:12 AM	CyanGate CyanGate		114.98 KB
  		Great-Canyon-Lake-lake-wallpaper-landscape-480x...	1/18/2017 2:47 AM	CyanGate CyanGate		65.79 KB
  		GT250_Accessories.pdf	1/18/2017 2:47 AM	CyanGate CyanGate		105.78 KB
  		IMG_2969.JPG	1/18/2017 2:47 AM	CyanGate CyanGate		115.26 KB

Figure 5

- (1) First column contains "**Select All**" and "**Select Single Item**" check box options. This column is used to select items for multiple processing (download, email, delete, cut, copy). You can select items by clicking checkboxes.
- (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.

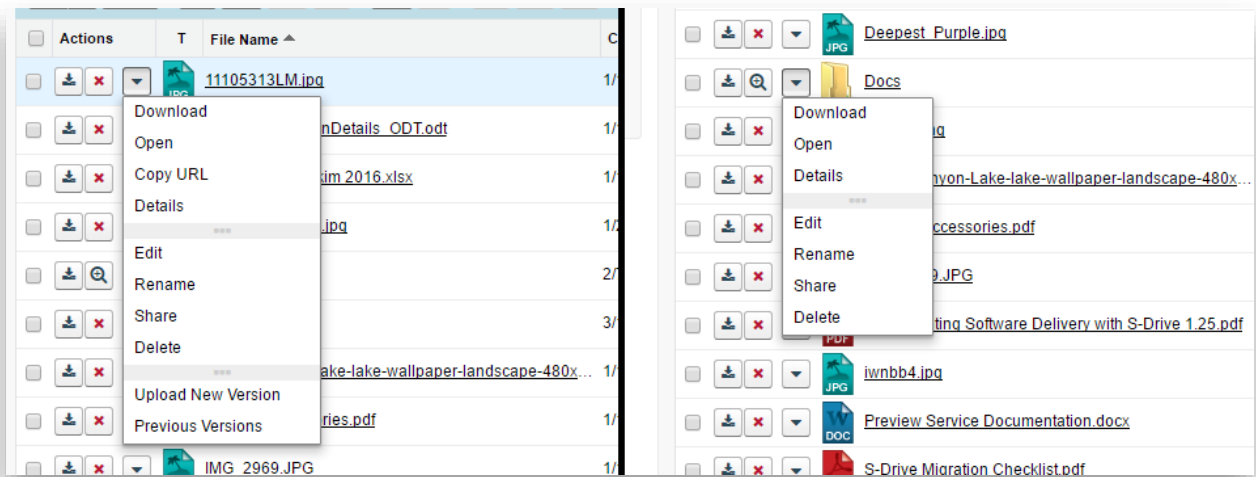


Figure 6

- (a) **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.
- (b) **Open:** It opens files that browsers support to view. If browser cannot open, it will be downloaded.
- (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) **Rename:** This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section 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) **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.
  - (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.
- (3) **"File Type Icon"** column is used to distinguish file types. Folders, text files, image files etc. have different icons. You can sort by file types by clicking the column header (Figure 5).
  - (4) **"File Name"** column is used to display file names (including file extensions) and folder names. You can sort by file name alphabetically ascending or descending by clicking the column header (Figure 5).
  - (5) **"Created Date"** column is used to display the file upload date. File creation date is displayed in the month/day/year hour: minute form. You can sort files by creation dates ascending or descending by clicking the column header (Figure 5).
  - (6) **"Created By ID"** column is used to display the file creator information based on the logged in user while uploading the file. You can sort files by created by field alphabetically ascending or descending by clicking the column header (Figure 5).
  - (7) **"Description"** column is used to display the custom description of the file/folder. This description is saved while uploading the file or creating the folder by the user. It can also be edited easily at any time. (Figure 5).

(8) "File Size" column is used to display file size information. Folders have 0 bytes file size. You can sort filenames by file size ascending or descending by clicking the column header (Figure 5).

## 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.

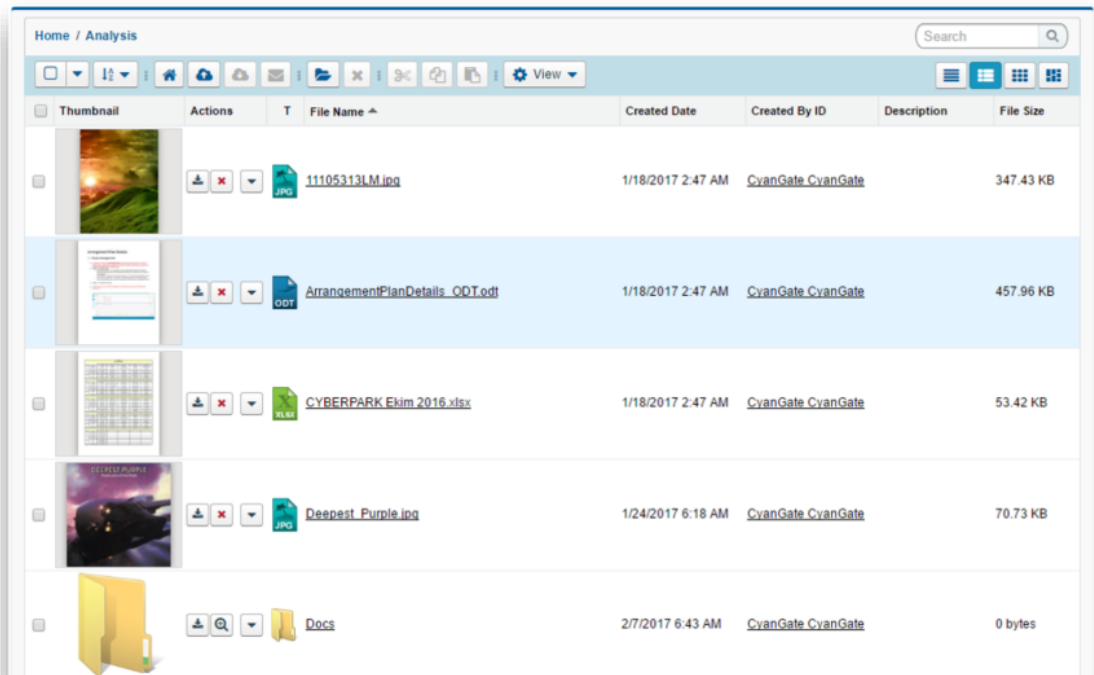


Figure 7

## C. Grid View

On Grid view, each item is listed on grid-card style with same height (Figure 9). To select grid view, Preview & Thumbnail feature should be enabled. In the Grid view and Card view, action buttons, menu & selection checkboxes are different (Figure 8).



Figure 8

- 1) **Selection Checkbox:** When mouse is hovering over a card, a checkbox is shown on the top-left side. You can select or deselect item by using this checkbox.
- 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.
- 3) **Download Button:** You can download file or folder by using this button.
- 4) **Edit Button:** You can edit file or folder description by click this button.
- 5) **Delete Button:** It deletes file or folder. To see more information, you can see Delete section.
- 6) **Action Menu Button:** You can access all actions about file or folder to click this down arrow button (Figure 10). To get detailed information on actions menu please check List View \ Actions section.

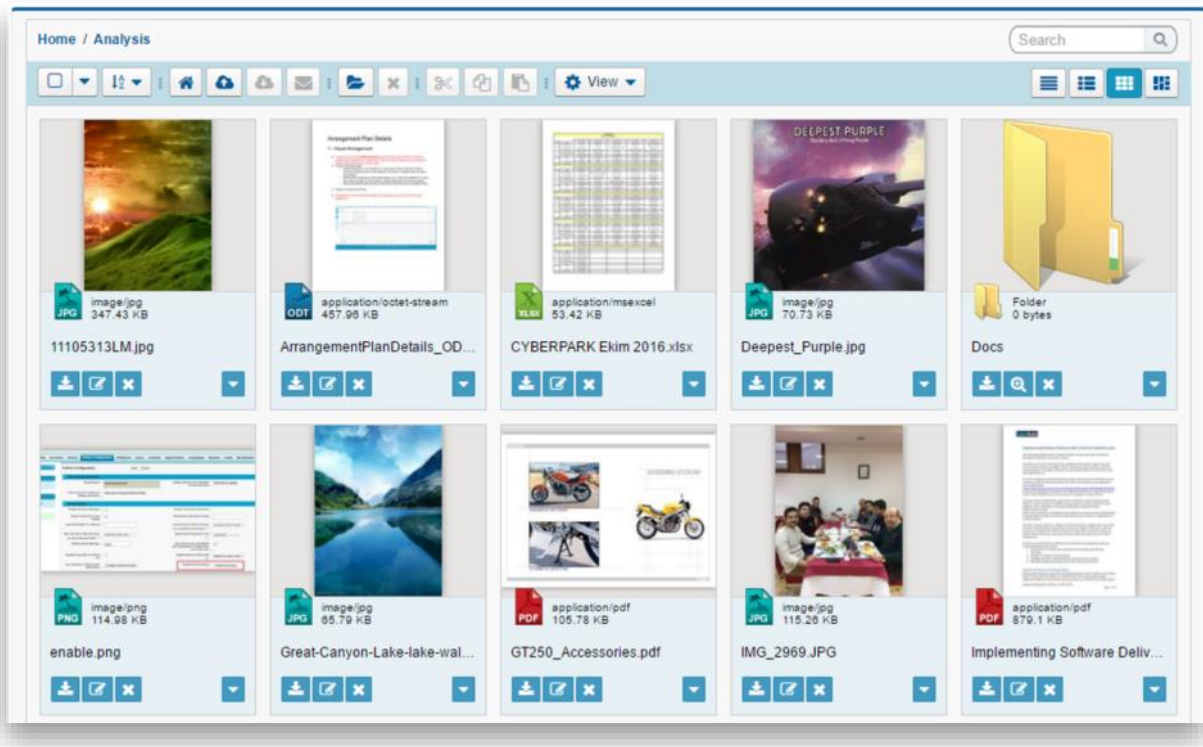


Figure 9

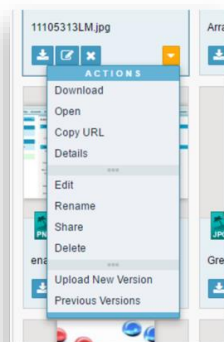


Figure 10

#### D. Card View

Card view is only active for users who enabled Preview & Thumbnail Feature. On Card view, differently Grid view, for each card has its own height value. By this difference, thumbnail pictures are more flexible to see and has modern looks. You can also, sort and user other functions as in Grid View (Figure 11).

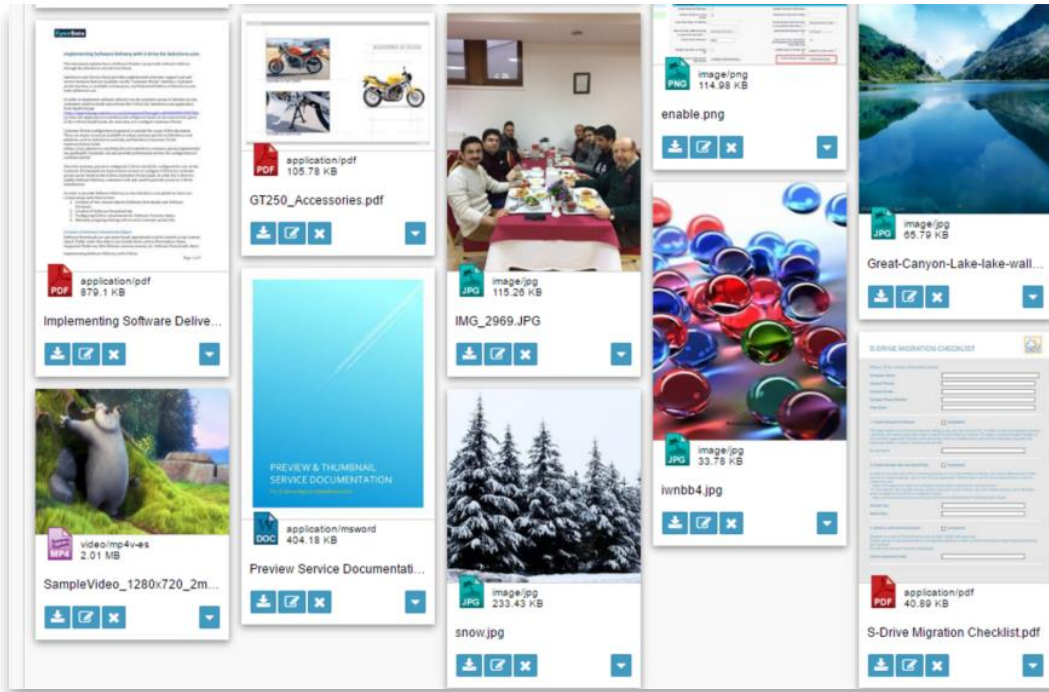


Figure 11

## 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. (Figure 12) Detail view consist of three main part: Preview image of file if exist, File properties & custom fields and Action buttons. To get detail information on actions menu please check **List View \ Actions** section.

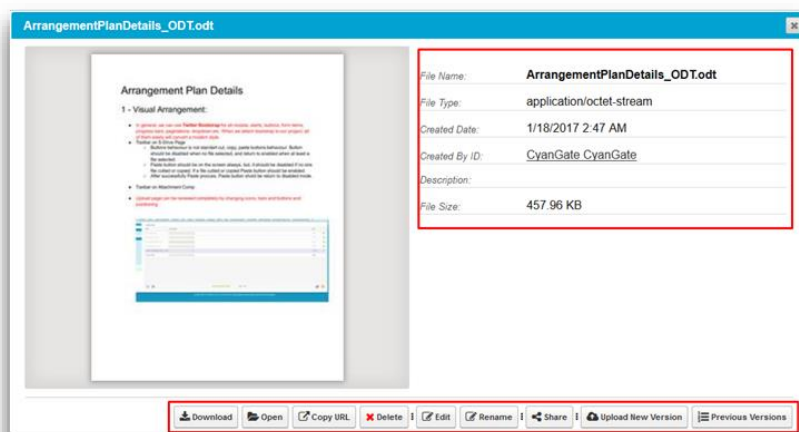


Figure 12

## C. Creating Folders

You can create folders by clicking "Create Folder" button in the toolbar (Figure 3-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 Folder" button. After clicking the "Create Folder" button, a new pop-up screen will be opened (Figure 13):

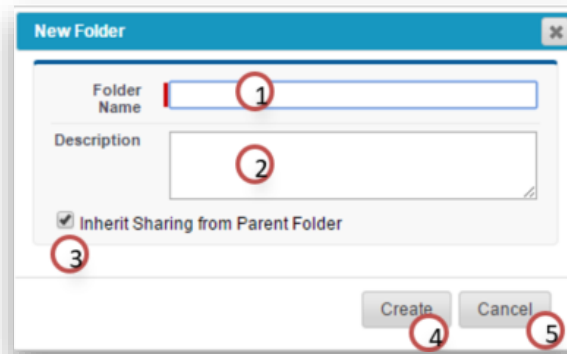
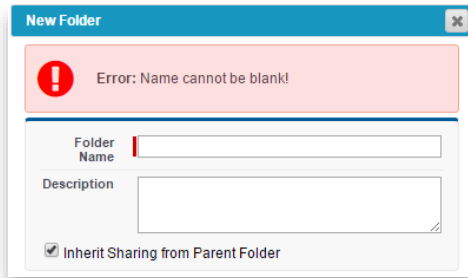


Figure 13

- (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) **"Create Button"**: After filling in the required fields, you can click OK button to create the new folder. S-Drive will create the new folder and refresh the folder structure for you (Figure 13-4).
- (5) **"Cancel Button"**: If you decide not to create a folder, you can click Cancel button. Operation will be cancelled, and you'll return back to the S-Drive Folders screen (Figure 13-5).

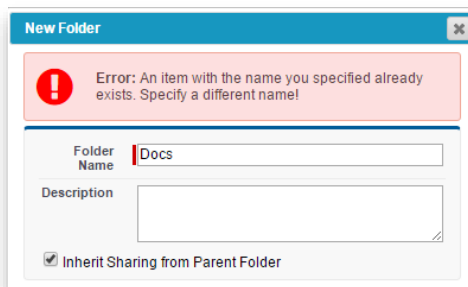



The dialog box has a title bar 'New Folder'. Below it is a red error message box that says 'Error: Name cannot be blank!'. Underneath, there is a 'Folder Name' text field which is empty, a 'Description' text area, and a checkbox labeled 'Inherit Sharing from Parent Folder' which is checked.

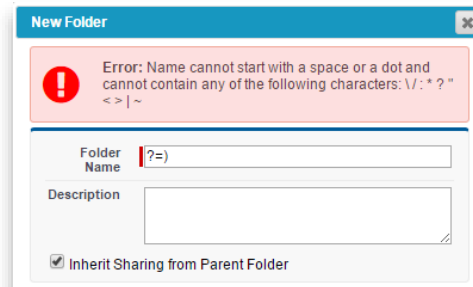
1. If you try to create a folder without a name, with forbidden characters, or with a name that exists in the current folder you'll get one of the warning messages below:
  - 'Name cannot be blank!'
  - 'Name cannot start with a space or a dot and cannot contain any of the following characters: "\ /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

*already exists. Specify a different name!'*

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



The dialog box has a title bar 'New Folder'. Below it is a red error message box that says 'Error: An item with the name you specified already exists. Specify a different name!'. Underneath, the 'Folder Name' text field contains the text 'Docs', the 'Description' text area is empty, and the 'Inherit Sharing from Parent Folder' checkbox is checked.



The dialog box has a title bar 'New Folder'. Below it is a red error message box that says 'Error: Name cannot start with a space or a dot and cannot contain any of the following characters: \ / : \* ? " < > | ~'. Underneath, the 'Folder Name' text field contains the text '?=)', the 'Description' text area is empty, and the 'Inherit Sharing from Parent Folder' checkbox is checked.

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

## D. Uploading Files

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 3-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.

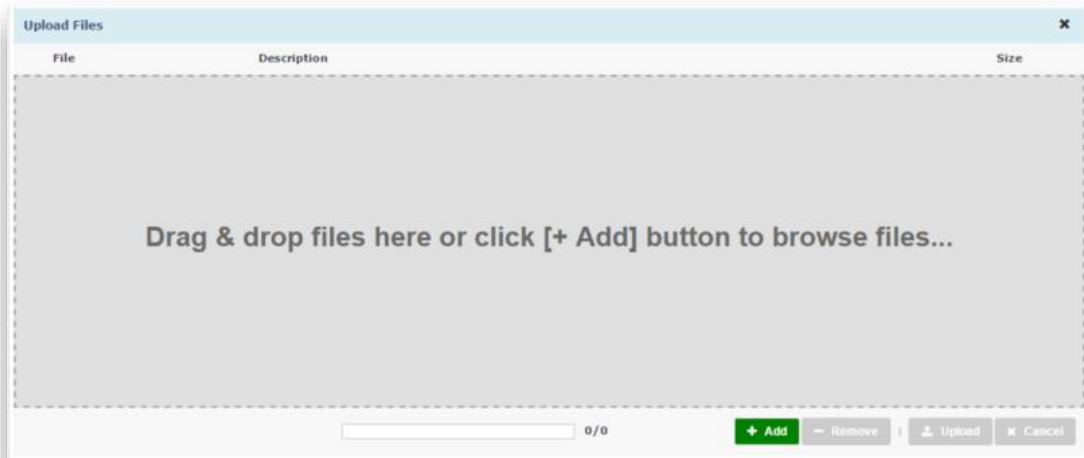


Figure 14

- (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 (Figure 15).

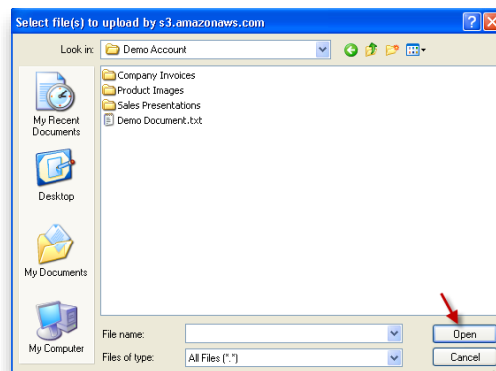


Figure 15

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".

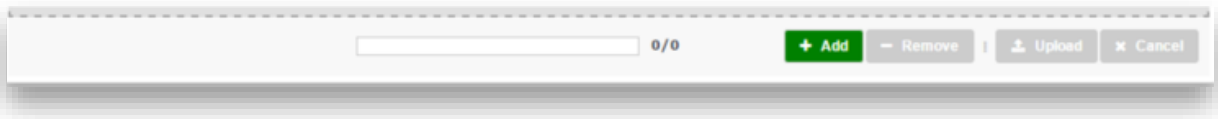


Figure 16

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.

- (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.

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

- (7) **"Description Column"**: This column is used to write a description to each file to be uploaded. This is an optional field meaning that you don't have to write descriptions to files. To write a description to a file, click the cell under the Description column for that file. Type in your description and press Enter or click somewhere else in the list. Description will be saved with the file while uploading (Figure 17).



Figure 17



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 18).











	Screenshot_4.png	<input type="text"/>	16 kb
	sdrive_page1.png	<input type="text"/>	95 kb
	Screenshot_3.png	Sample page upload panel	13 kb
	Relaxing Music Mix - BEAUTIFUL P...		350.1 mb
	SalesforceForOutlook.exe	<input type="text"/>	28.8 mb

Figure 18

-  **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.



1. If you try to upload a file with a name that exists in that folder, you'll get a warning message saying, "Do you want to overwrite the file?" There are three possible answers: *Yes*, *No*, and

*Cancel* (Figure 19). You may get this message multiple times for multi-file uploads for each file that has the same name of a file or folder in the uploaded folder.

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

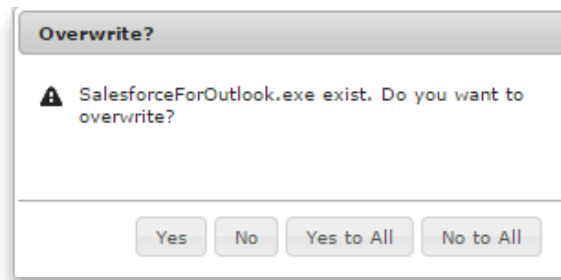


Figure 19

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

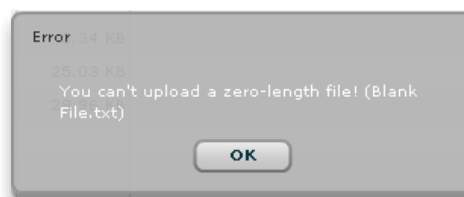


Figure 20

3. After processing the upload list, you'll be informed by saying *"Upload(s) completed successfully"* if list is processed without any errors (Figure 21). After clicking OK button, upload screen will be closed, and the current folder will be refreshed.

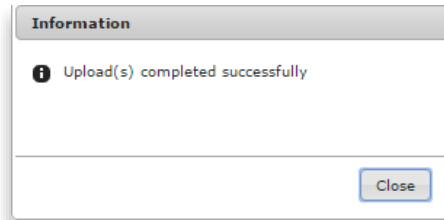


Figure 21

4. **"Upload File(s)"** button becomes invisible if you do not have permissions to upload file(s).
5. **"Upload File(s)"** button becomes invisible for the **"Search Results View"** once a search operation is performed. So, you cannot upload file(s) to the search results screen. You need to click **"Back to Home"** and go to the folder where you want to upload file(s).

## E. 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

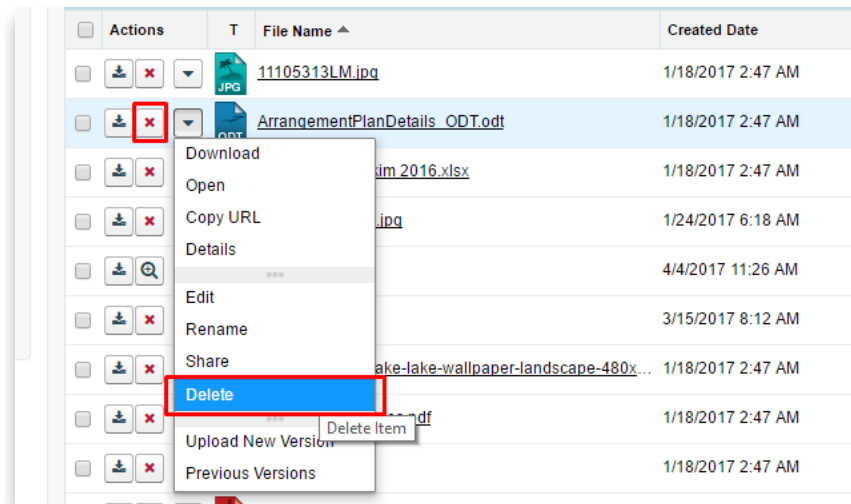


Figure 22

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 22). Using this method, you can delete files one by one. After clicking the "Delete File" item action menu you'll be asked if you are sure (Figure 23).

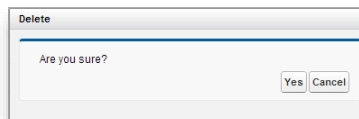


Figure 23

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.



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

## 2. Multiple File Deletion

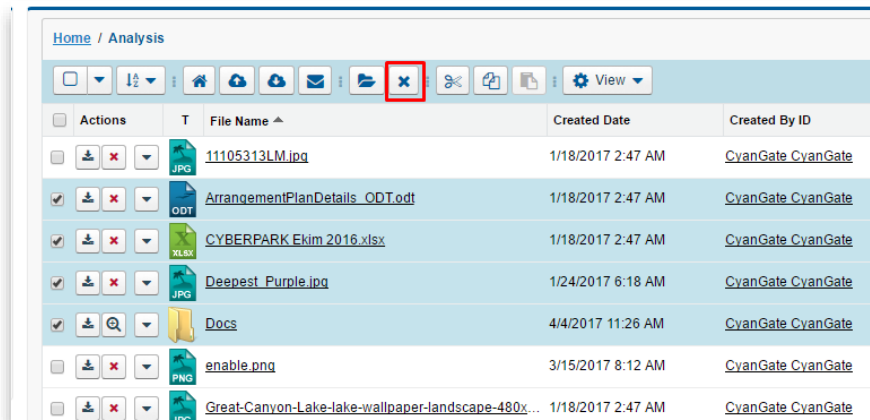


Figure 24

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 24). Using this method, you can delete multiple files at a time. After clicking the "Delete File(s)" button you'll be asked if you are sure (Figure 23). 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.

## F. Deleting Folders

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

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

If you try to delete a folder which contains items in it; you'll get *"You cannot delete this file at this time: There are sub files in one or more of the selected folders, please delete the sub files first before"*

*deleting the folders!* " warning message (Figure 25). You need to first delete items under this folder, and then you can delete that folder. Besides that, delete operation can be applied same as written in "Deleting Files" section.

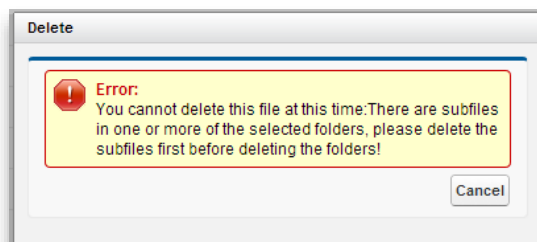


Figure 25

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



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 26) 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.

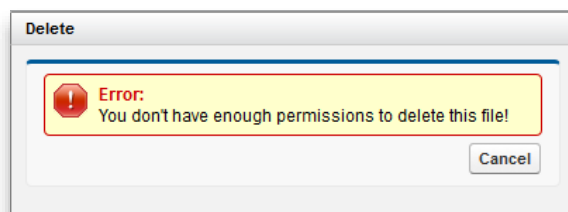


Figure 26

## G. 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 27). First select the files to email from the folder you want by clicking checkboxes next to each file, then click "Email" button in the toolbar. Email screen will be opened (as a popup for S-Drive Folders, as a new page for S-Drive Attachments).

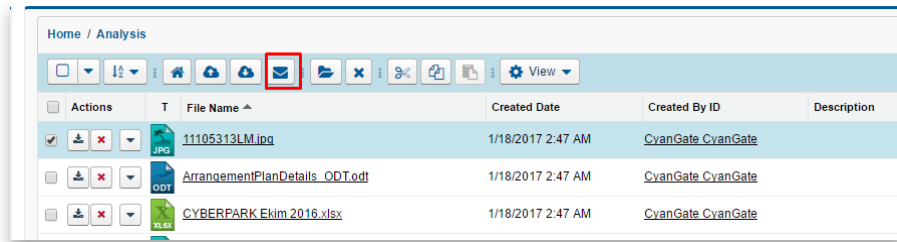


Figure 27

Email Files screen contains many features (Figure 28). Let's review the details of the fields in this screen:

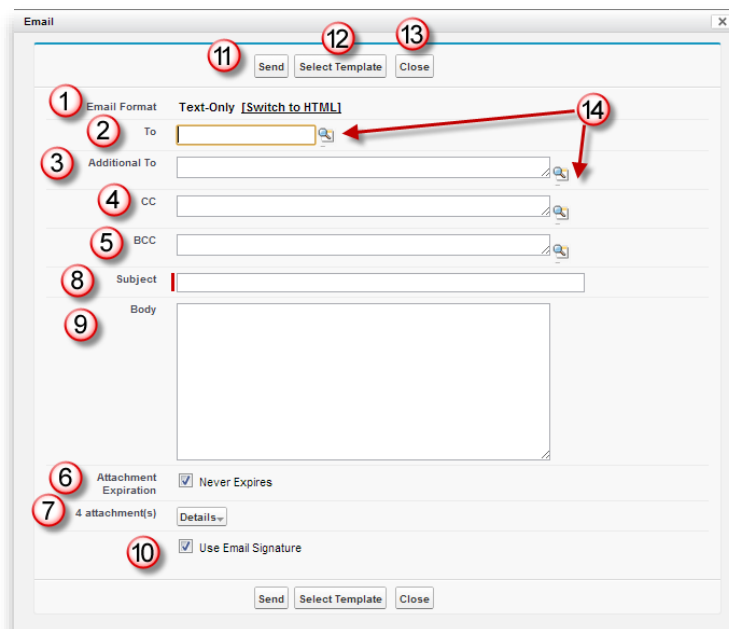


Figure 28

- (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 28-1).
- (2) **"To..."**: The main recipient of the email (Figure 28-2). 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 28-14) 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 29). 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.

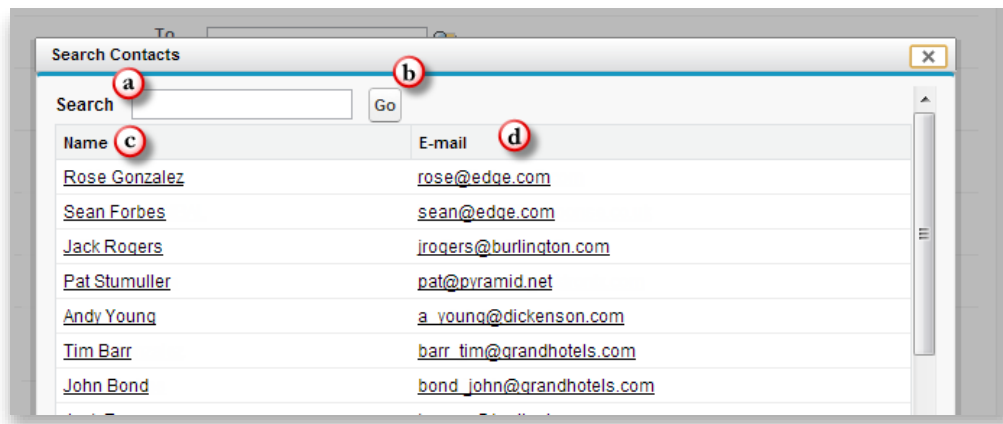


Figure 29

**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 29-a).
  - (b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 29-b).
  - (c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 29-c).
  - (d) **"Email Column"**: Results' emails will be displayed in this column (Figure 29-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 28-14) to select

recipients from Salesforce contacts (Figure 28-3). "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 28-14) to select recipients from Salesforce contacts (Figure 28-4). "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 28-14) to select recipients from Salesforce contacts (Figure 28-5). "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 28-6). 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 30). 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.

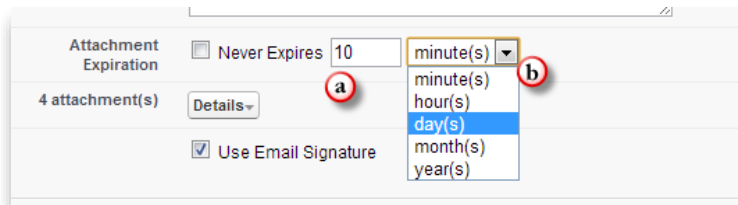


Figure 30

- (a) **"Number Field":** Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 30-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 30-b).
- (7) **"Attachment Details":** This section gives information about attached files (Figure 28-7). 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 31).

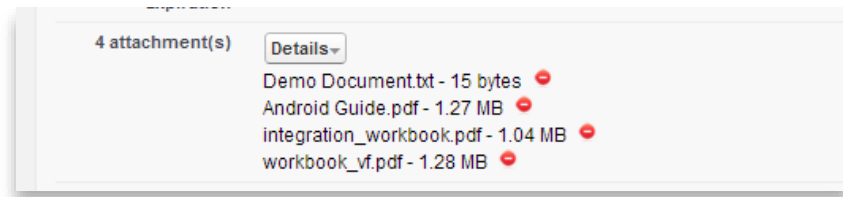


Figure 31

(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 28-8).

(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 28-9).

(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 28-10). "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 28-11). 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 32).

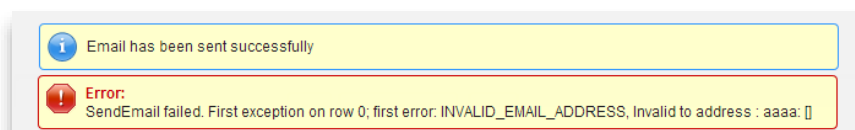


Figure 32

(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 33). 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.

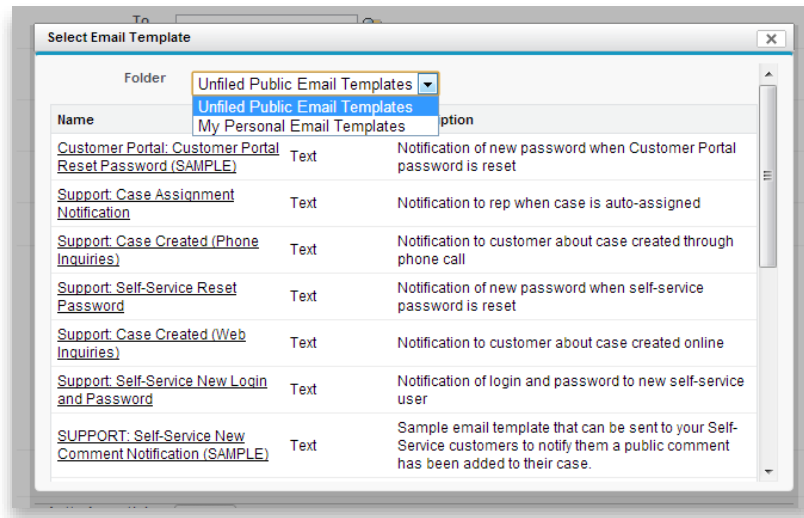


Figure 33

(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 28-13).



1. You cannot email folders. If you try to email a folder as an attachment, you'll get "You can't email a folder. Please check your selection list and try again!" message (Figure 34).

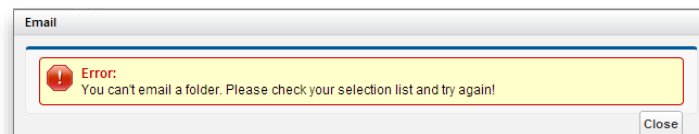


Figure 34

2. With S-Drive 2.0, you can email "S-Drive Folder" files from an object by relating with it easily. For this purpose, you can either use "Attach from S-Drive Folders" button or a custom button can be added. Adding a custom button is explained in S-Drive Advanced Configuration Guide's "Email "S-Drive Folder" Files from an Object using a Custom Button" section. Instructions using "Attach from S-Drive Folders" button for Case Files are provided below, but you can follow the same instructions for Accounts, Contacts, Opportunities or other standard/custom objects:
  - a. Click to a Case record and scroll down to Case Files related list. Then click "Attach from S-Drive Folders" button (Figure 35).

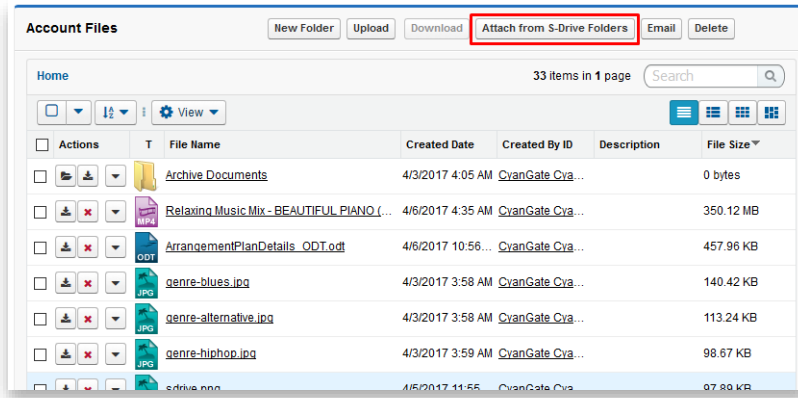


Figure 35

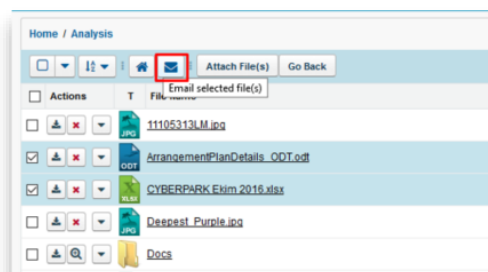


Figure 36

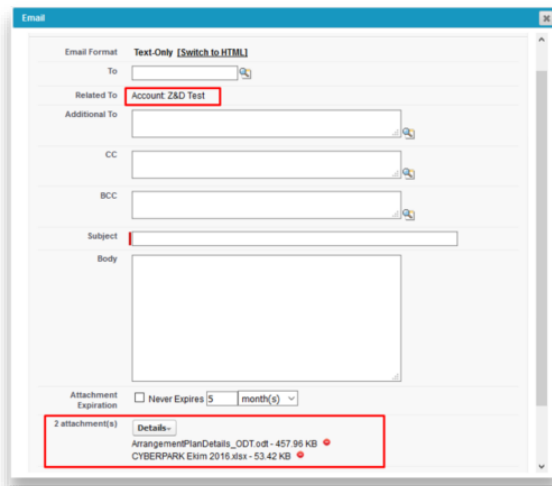


Figure 37

- b. Select files to send and click Email button (Figure 36). You can see that "Related to" field is populated with related Case. Fill in the other fields and click "Send" button (Figure 37).

## H. Post Files to Chatter

You can make comments on different files you have on your S-Drive files. For this purpose, you can navigate to the “Chatter” tab in a “Detail” page of a file.

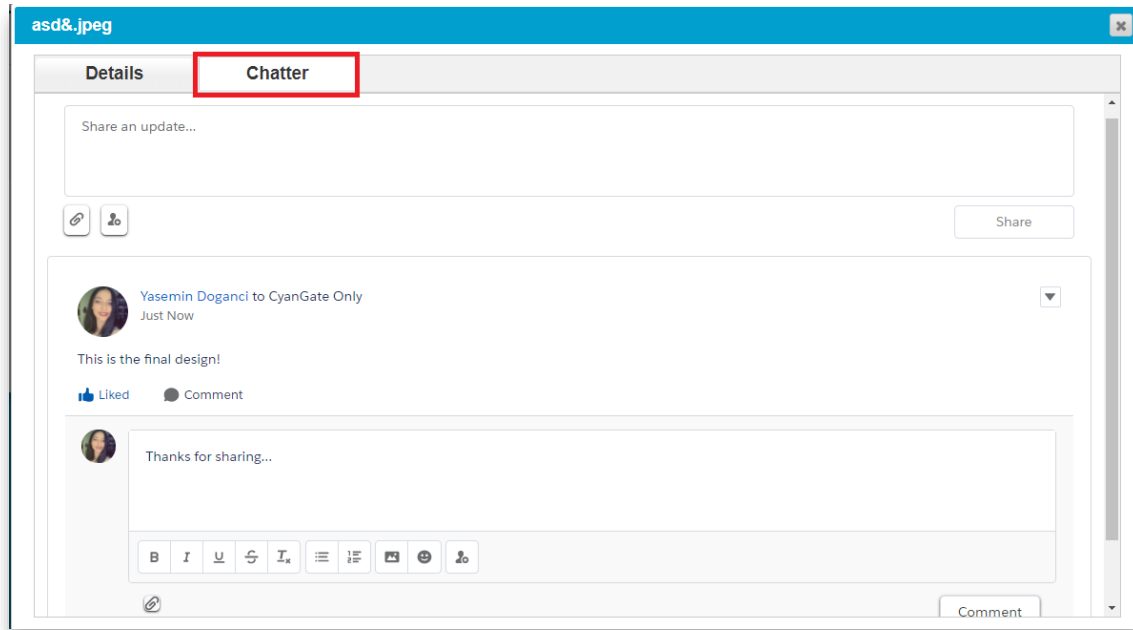


Figure 38

Here, you can reach the Chatter publisher where you can share your ideas and thoughts, and under the publisher the Chatter feed, where you can reach the posts about the file, like them and also make comments.

*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.*

## I. 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

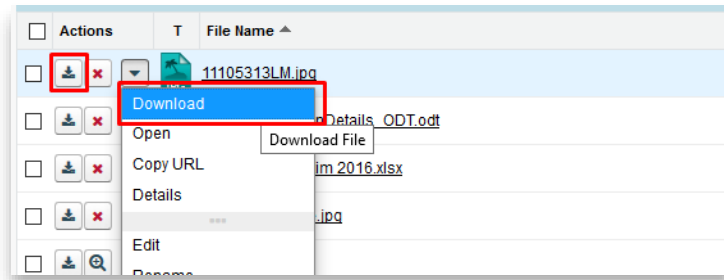


Figure 39

You can download individual files by clicking "**Download**" item menu action and download shortcut button from the "**Item Actions**" button (Figure 39). 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.) (Figure 40). If you select "Download" action for a folder it directs to Zip & Download.

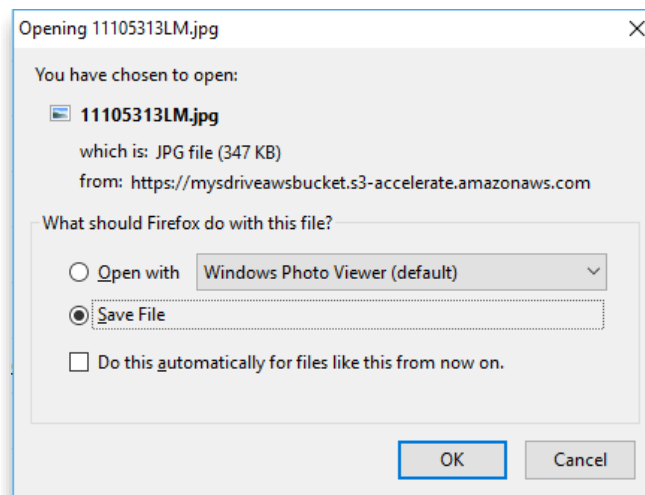


Figure 40

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

If you choose multiple file and click download button on Sdrive 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 41).

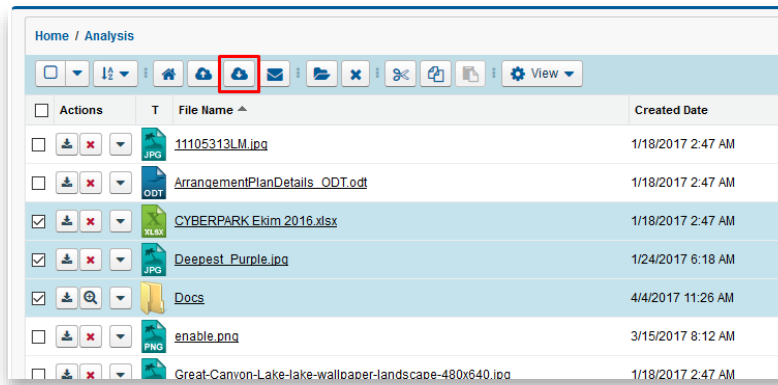


Figure 41

When you start Zip And Download action, you see an alert box on the bottom side of the page (Figure 42).

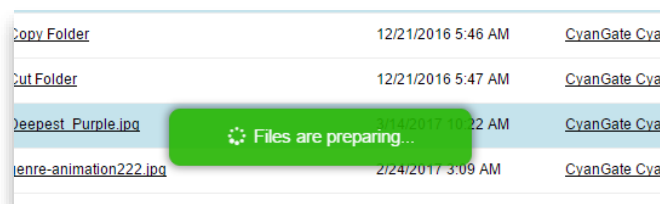


Figure 42

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 43). 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 .

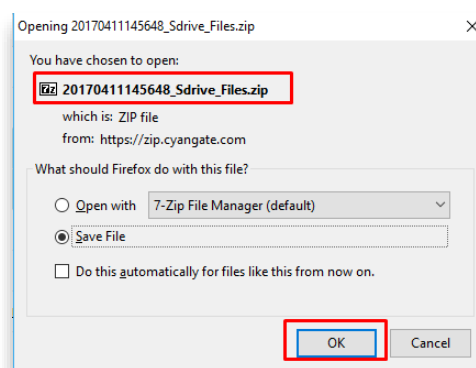


Figure 43



## J. Opening Files

If you want to open the files automatically, you should click "Open" link (Figure 44).

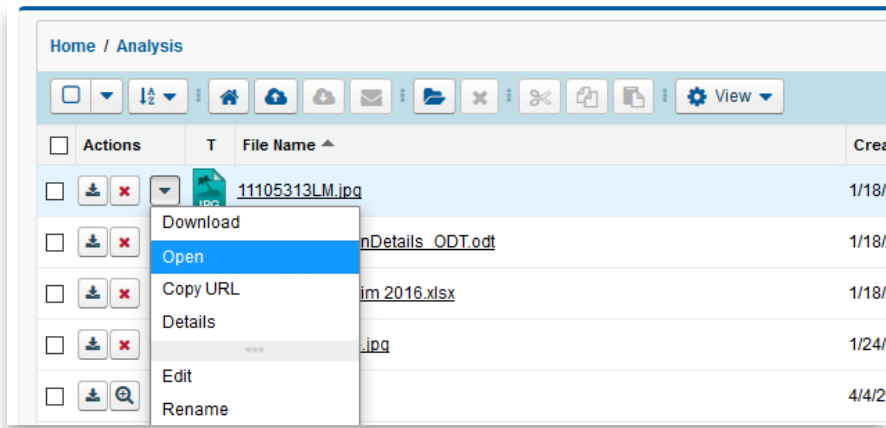


Figure 44



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://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](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](http://kb.mozillazine.org/File_types_and_download_actions)

## K. 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 45).

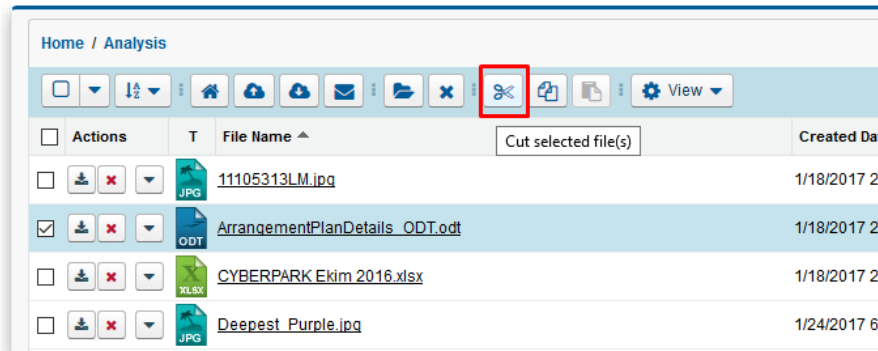


Figure 45

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 46).

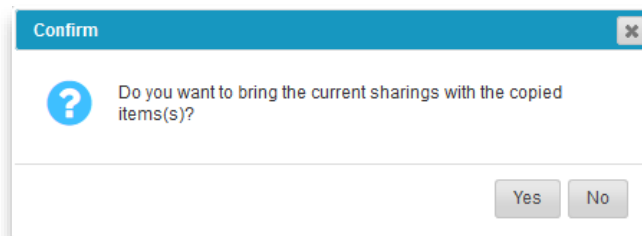


Figure 46

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 47). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.

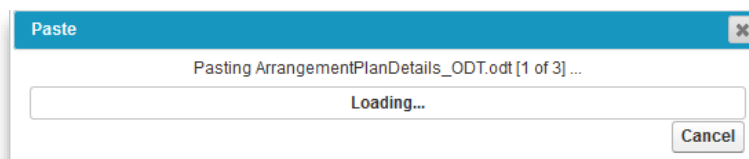


Figure 47

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 48).

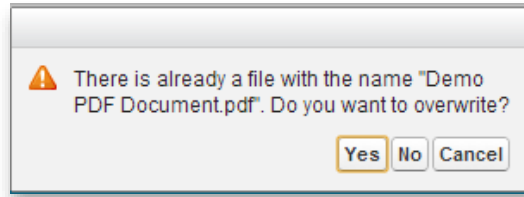


Figure 48

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.



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.

## L. 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 49).

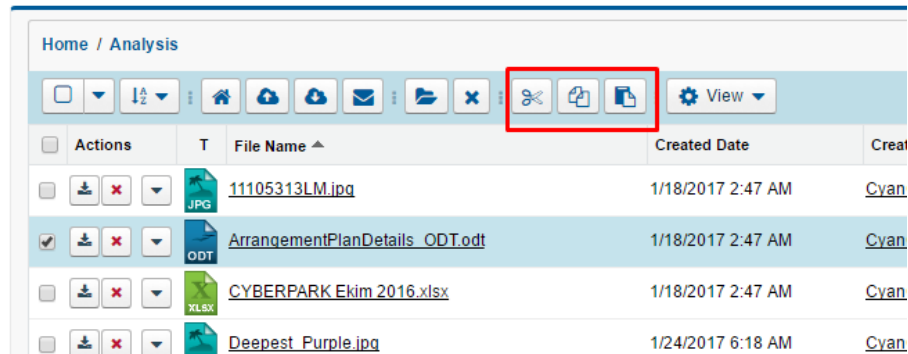


Figure 49

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).

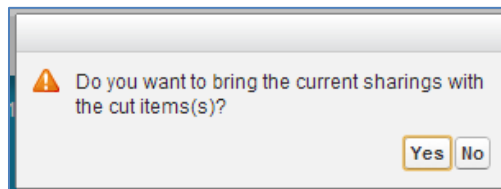


Figure 50

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

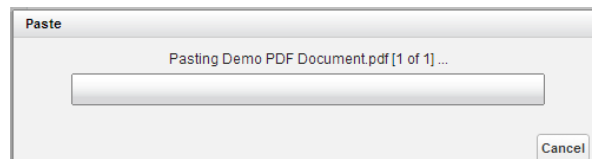


Figure 51

If there is already a file with that name inside the target directory, S-Drive will warn you with the "Do you want to overwrite?" message (Figure 52).

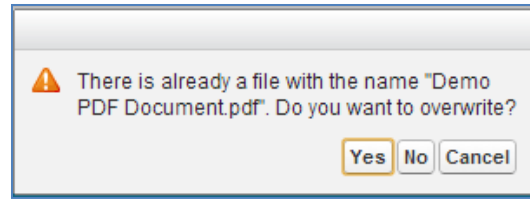


Figure 52

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



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

## M. Renaming Files & Folders

To rename files and folders in S-Drive you just need to select "Rename" item menu action from the "Item Actions" menu of the item that you want to rename (Figure 53-1), and type in the new name in the opening Rename screen (Figure 53-2).

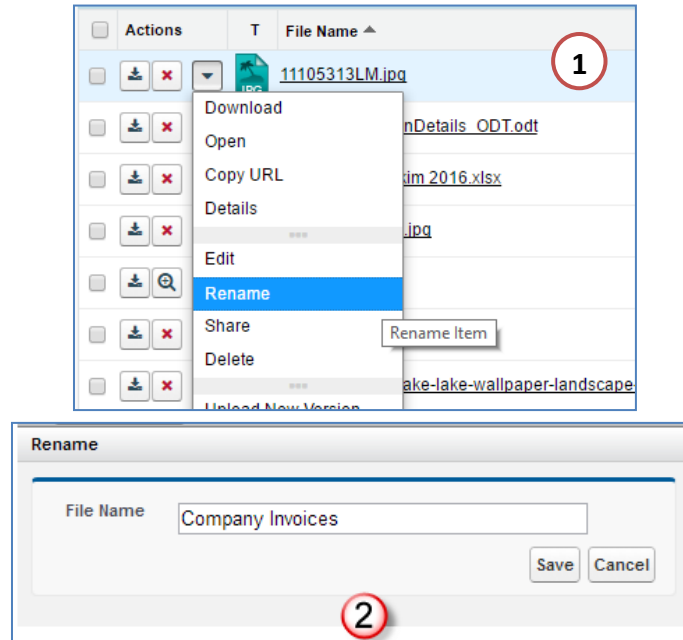


Figure 53



1. If you try to rename a file/folder that you do not have edit permissions, you'll get "You don't have enough permission to update this file!" error message (Figure 54).

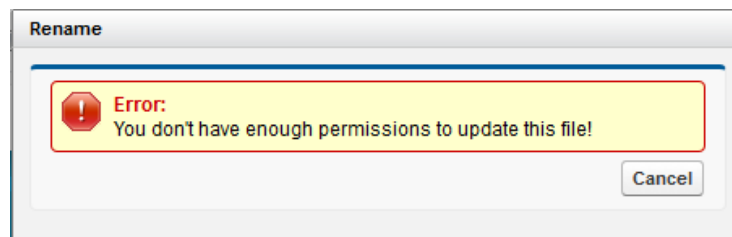


Figure 54

## N. 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 55).

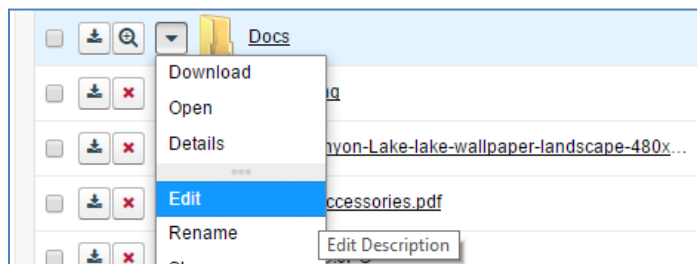


Figure 55

A new pop-up named "Edit" will be opened. You can change the description here and click "Save" button to save changes. If you click Cancel button, description won't be updated and this pop-up will be closed (Figure 56).

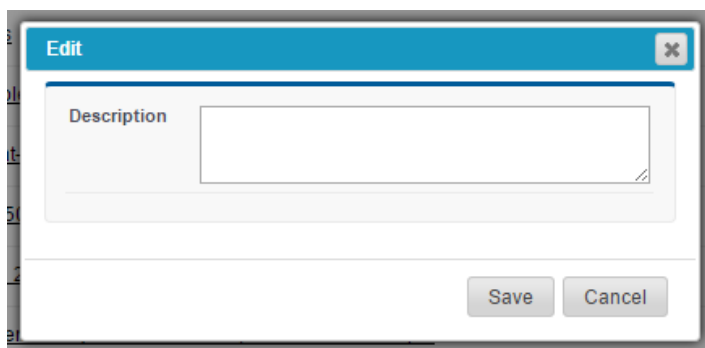


Figure 56



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 57).

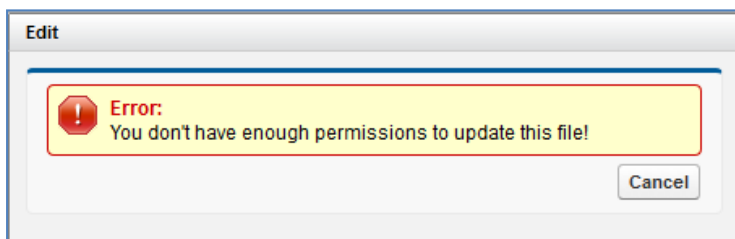


Figure 57

## 0. 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 58).

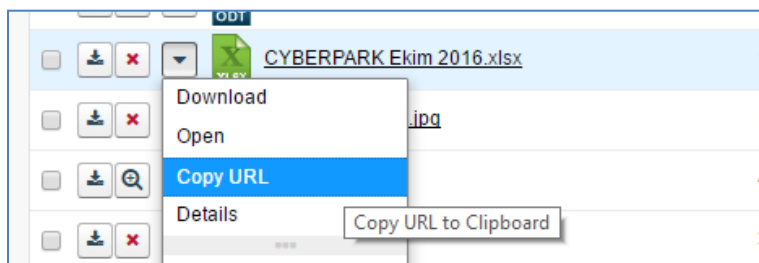


Figure 58

After clicking this button, Copy URL pop-up will be displayed (Figure 59). Select the URL by clicking "Select URL" link in this pop-up. You can close this pop-up by clicking "Close" link.

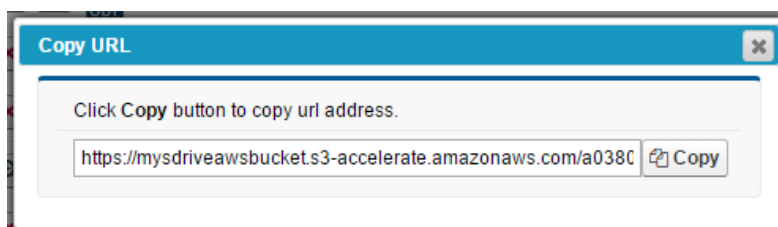


Figure 59

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 60).

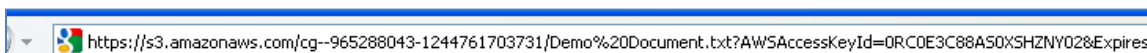


Figure 60



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".



## P. 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 61).

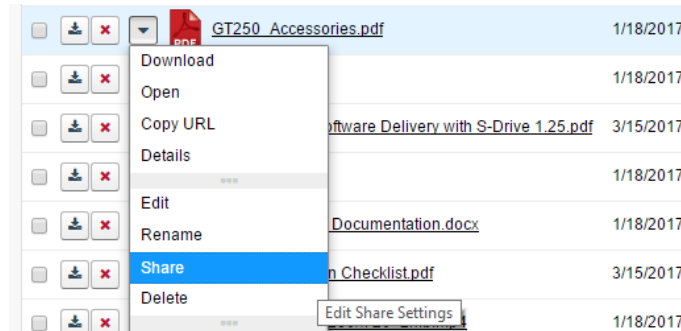


Figure 61

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 62). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.

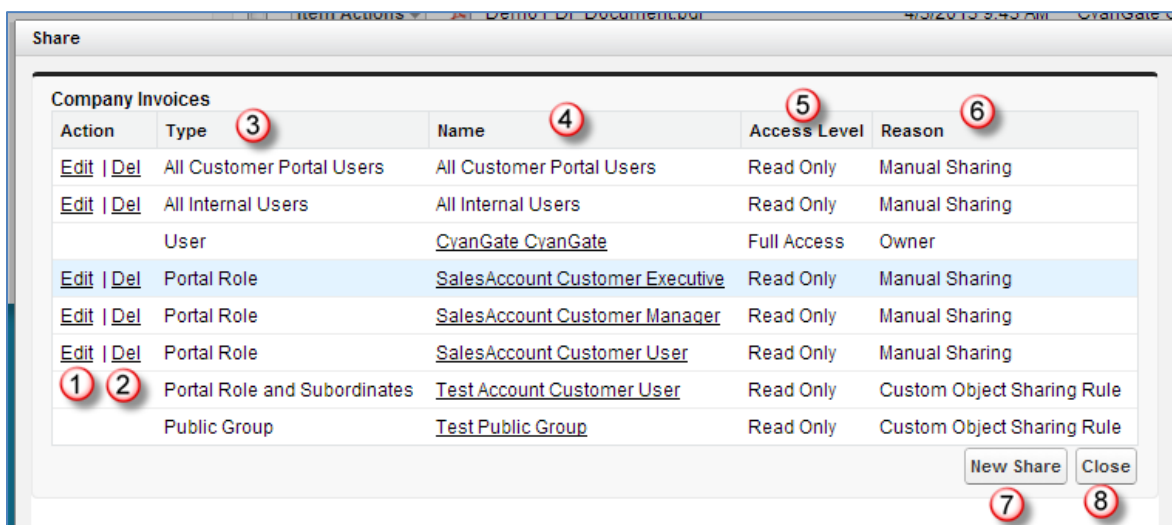


Figure 62

"Action" column is used to edit or delete the manual shares (Figure 62-1 and Figure 62-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 62-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 62-4). 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 62-5). "Reason" column displays the reason of the sharing (Figure 62-6). 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 62-7) and close this screen by clicking "Close" button (Figure 62-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 63). You can select the "Type" from the dropdown (Figure 63-1). Once you select the type, available fields will be listed in "Available" section (Figure 63-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 63-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 63-4). 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 63-5).

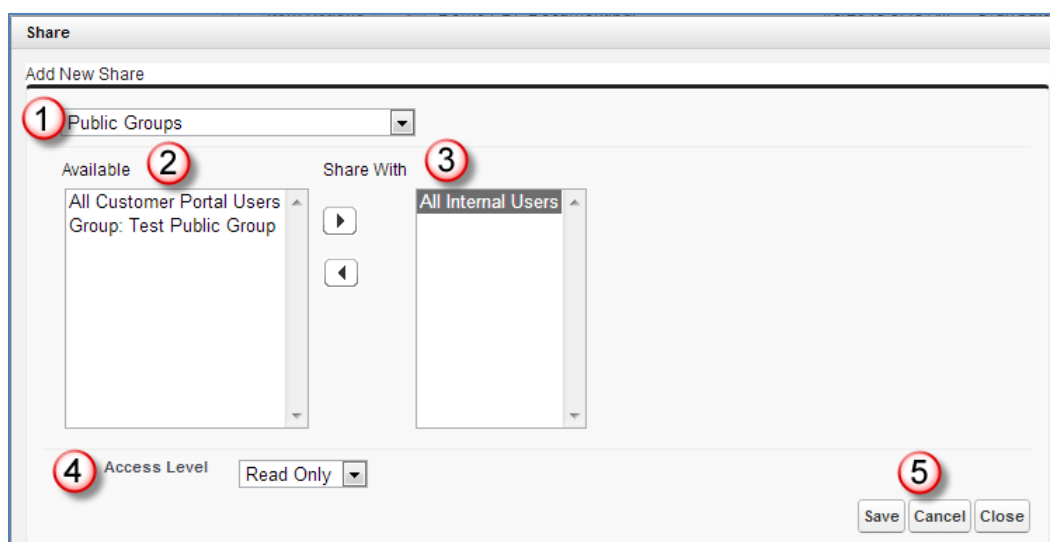


Figure 63

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 62-1). You can change selected object's access level and save (Figure 64).

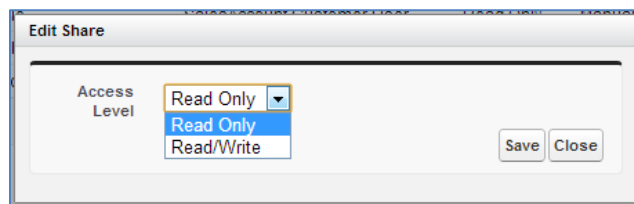


Figure 64

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 62-2). If you select "Yes", share will be deleted (Figure 65).

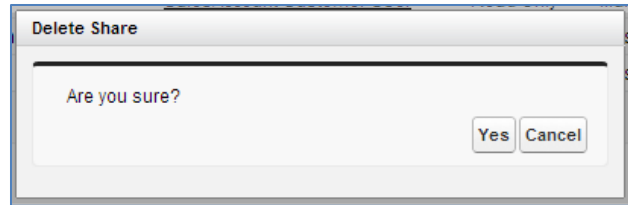


Figure 65



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 66) at the time of creation.

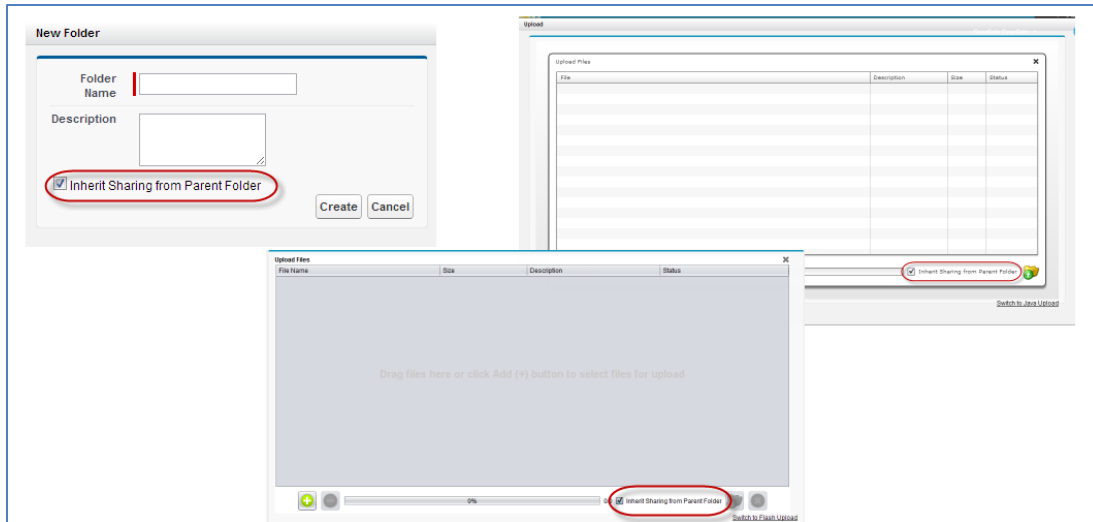


Figure 66

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.

## Q. 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 67). Only HTML Upload Manager supports version upload.

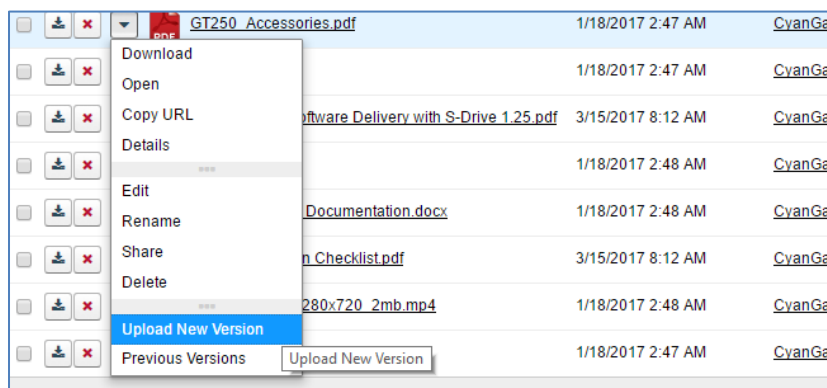


Figure 67

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.

## R. 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 68).

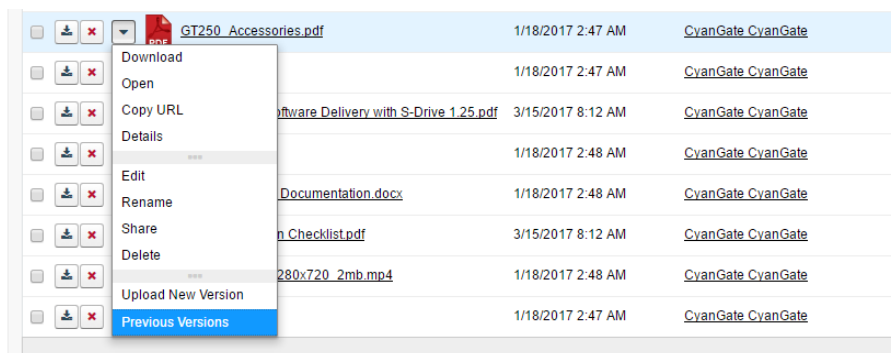


Figure 68

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 69)

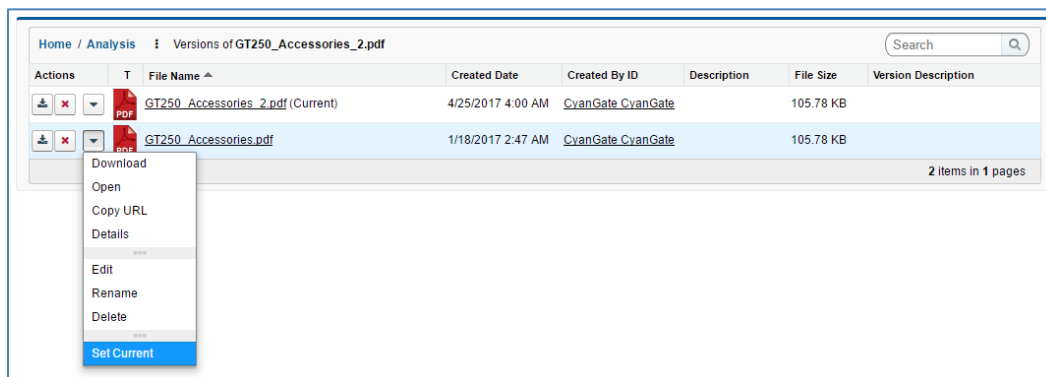


Figure 69

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.

## S. Searching Items

You can search for files and folders inside S-Drive Folders. To start a search, type the search criteria to the right corner of S-Drive Folders screen, into the search box and click Enter (Figure 70).

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

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

Back to Home 12 Result(s) Found

Actions	T	File Name	Created Date	Created By ID	Description	File Size
	PDF	GT250 Accessories 2.pdf	4/25/2017 4:00 AM	CyanGate CyanGate		105.78 KB
	PDF	Implementing Software Delivery with S-Drive 1.25.pdf	12/27/2016 9:21 AM	CyanGate CyanGate		879.1 KB
	PDF	Implementing Software Delivery with S-Drive 1.25.pdf	3/15/2017 8:12 AM	CyanGate CyanGate		879.1 KB
	PDF	Implementing Software Delivery with S-Drive 1.25.pdf	1/24/2017 6:03 AM	CyanGate CyanGate		879.1 KB
	PDF	Implementing Software Delivery with S-Drive 1.25.pdf	1/24/2017 3:21 AM	CyanGate CyanGate		879.1 KB
	PDF	Implementing Software Delivery with S-Drive 1.25.pdf	1/11/2017 8:35 AM	CyanGate CyanGate		879.1 KB
	PDF	S-Drive Installation Guide 1.27.pdf	9/1/2016 6:59 AM	CyanGate CyanGate		1.37 MB
	PDF	S-Drive Migration Checklist.pdf	1/12/2017 7:22 AM	CyanGate CyanGate		40.89 KB
	PDF	S-Drive Migration Checklist.pdf	3/15/2017 8:12 AM	CyanGate CyanGate		40.89 KB
	PDF	S-Drive Migration Checklist.pdf	1/24/2017 3:21 AM	CyanGate CyanGate		40.89 KB

Figure 70



1. Salesforce.com does not index uploaded files immediately, so newly uploaded files will be eligible for search in a few minutes after the upload.
2. Pagination is not supported for search results. You'll see all results of a search in a single page.
3. Search is performed on searchable fields like "File Name" and "Description".
4. If you try to search with blank criteria, you'll get an error message saying: "Search keyword cannot be empty!" (Figure 71-1).

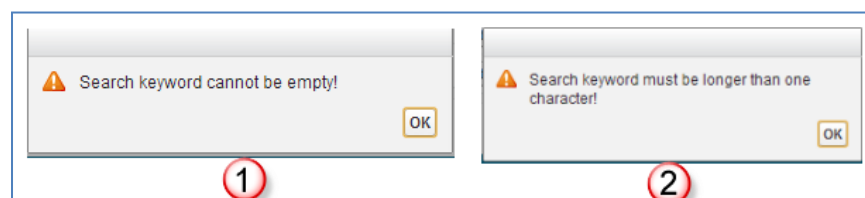


Figure 71

5. If you try to search with one character, you'll get an error message saying: "Search keyword must be longer than one character!" (Figure 71-2).

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

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments (Figure 72).



Figure 72

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 73).

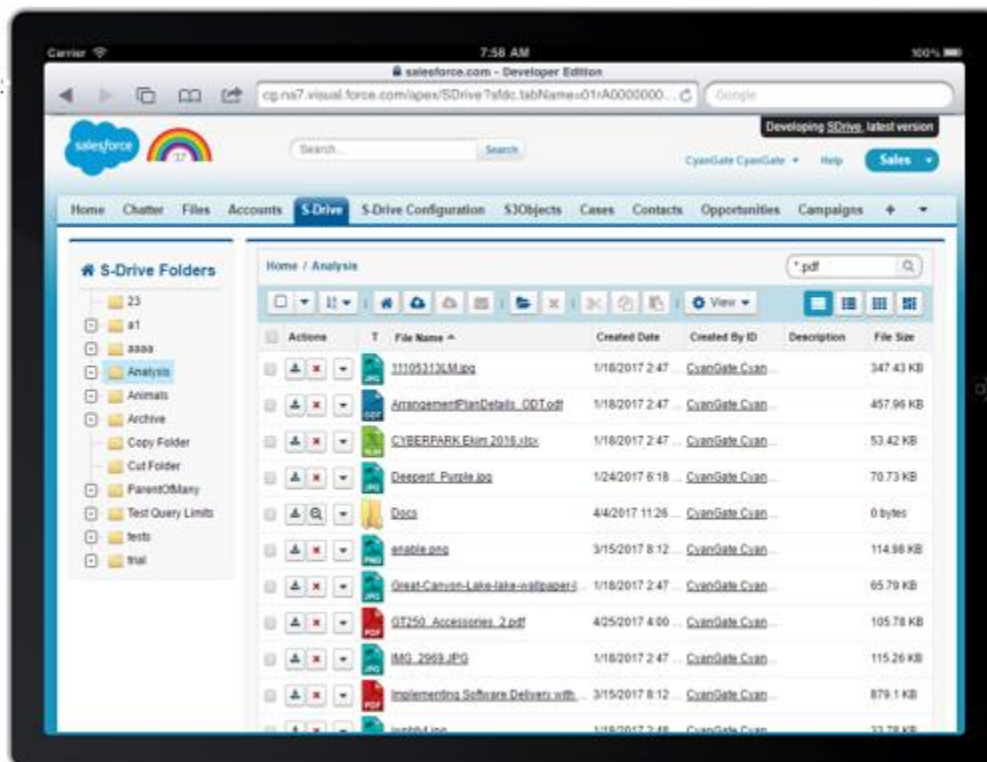


Figure 73



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

Below is a screenshot of the Case Files section from an iPad device (Figure 74).

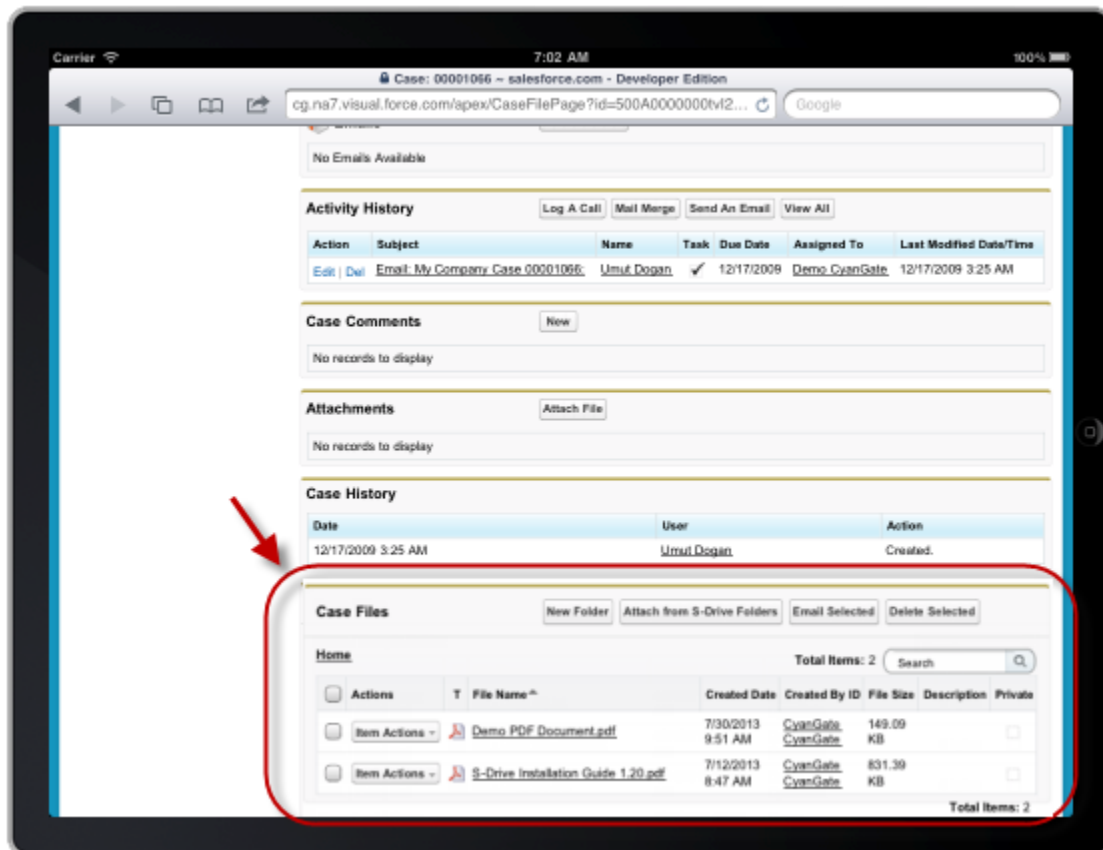


Figure 74

## U. S-Drive Attachments

S-Drive Attachments is the object attachments for S-Drive. You can create folders and upload files to objects without file size limitations using S-Drive Attachments. You can also attach files to the objects from S-Drive Folders. Account, Case, Contact, and Opportunity S-Drive Attachments are bundled in the S-Drive installation. You just need to make some configuration to start using S-Drive Attachments. Please refer to the "S-Drive Installation Guide" for configuration of the S-Drive Attachments. You can also use S-Drive Attachments for your other standard/custom objects using the instructions in "S-Drive Advanced Configuration Guide".

### 1. Account Files

After installing S-Drive, if you made the configuration correctly you'll be able to create account files in "Accounts" tab for each account easily. Go to your "Accounts" tab, select an account from the list (or create a new account). If you can see the "Account Files" page block in the current account's page, you can keep on reading (Figure 75). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.

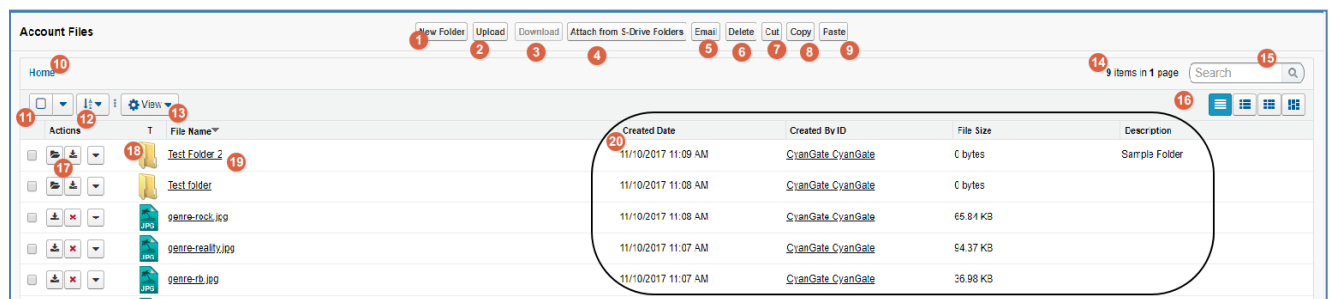


Figure 75

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 75-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 76).

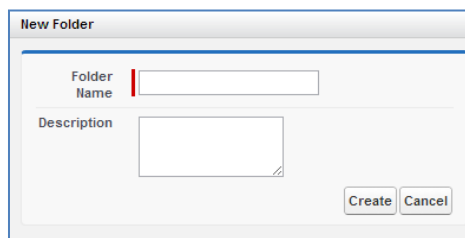


Figure 76

- (2) **"Upload File(s) Button"**: This button is used to add account files to this account (Figure 75-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 77).

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

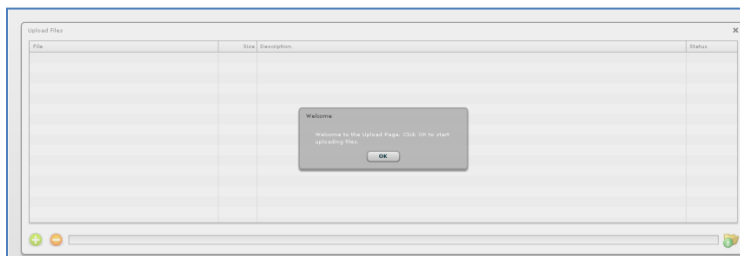


Figure 77

- (3) **"Download" Button**: Only when a file or folder selected, this button will be enable. If just one file selected, it directly starts to download file. If a folder or multi file selected, it prepares a zip file then starts to download it (Figure 75-3).
- (4) **"Attach from S-Drive Folders" Button**: This button is used to attach files from S-Drive Folders to this account (Figure 75-4). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this account (Figure 78-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 78-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed, and you can select more files to attach. If you select "No", page will be closed, and you'll be redirected to the account page (Figure 78-C). "Cancel Attach" button also redirects you to the account page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

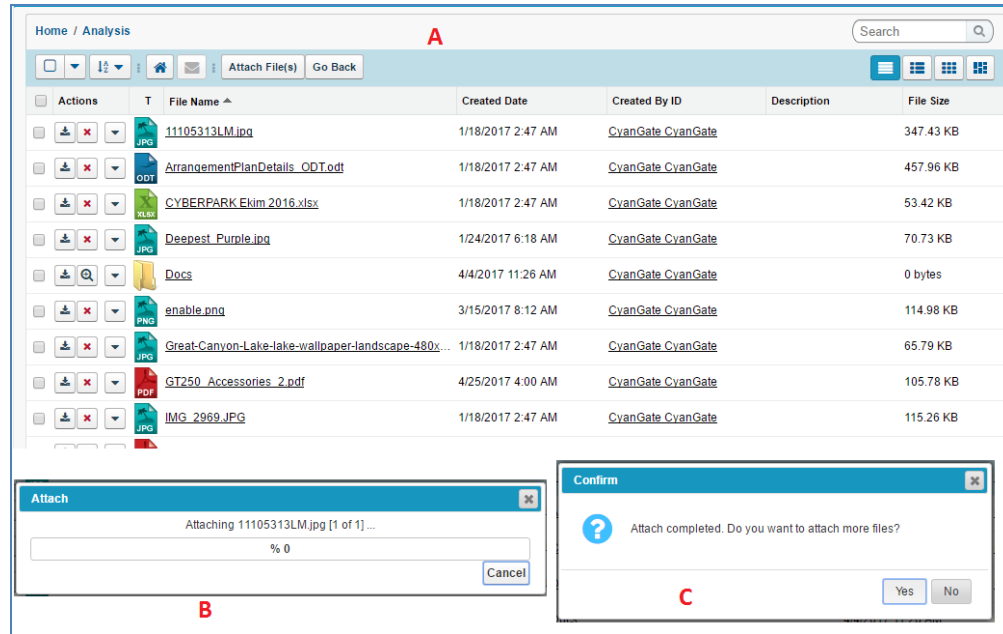


Figure 78



1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.

(5) **"Email" Button:** This button is used to email selected account files (Figure 75-5). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying *"Please select file(s) to email!"* (Figure 79). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

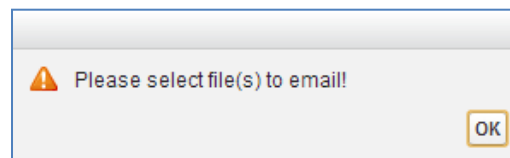


Figure 79

- (6) **"Delete Selected Button":** This button is used to delete selected account files from current account (Figure 75-6). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 80-A). Select "Yes" to delete, "Cancel" to

cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 80-B). If you click "Yes", delete process will start.

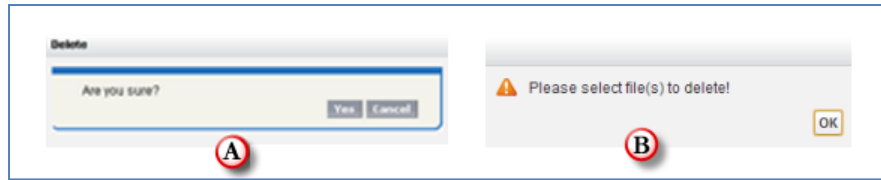


Figure 80



1. If you enabled versioning and have versions under the selected file, all versions of the selected file will also be deleted.
- (7) **"Cut Button"**: This button works for cutting selected file/files. There is no folder cut operation.
- (8) **"Copy Button"**: This button works for copying selected file/files. There is no folder copy operation.
- (9) **"Paste Button"**: This button works for pasting selected file/files. There is no folder paste operation.
- (10) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 75-7). You can click folders above to go to that folder.
- (11) **"Selection" Buttons**: (Figure 75-8)
  - a. **Select All Combo Button**: By this button you can directly click select box to select/deselect all. Or you can use dropdown menu to select/deselect all.
  - b. **Select All Checkbox**: First of headers, there is a check all checkbox element.
  - c. **Select Row Checkbox**: For each row, there is a check box to select/deselect row on it.
- (12) **"Order By" Dropdown Button**: Using this dropdown button you can reorder list by clicking field names inside the menu (Figure 75-9). If you click same field on the menu again, sorting order will change from ASC to DESC or vice versa.
- (13) **"View Settings" Dropdown Button**: By this button (Figure 75-10), you can set current view type as default for the object you are on. i.e. you can set Account Objects default view type as Grid View type. Whenever you open an Account object you see FileList in Grid style viewed. You can also set current order field and type as default orders.
- (14) **"Total Items / Pagination"**: Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 75-11). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and

total items are displayed next to the page numbers (Figure 81). 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 2<sup>nd</sup> page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

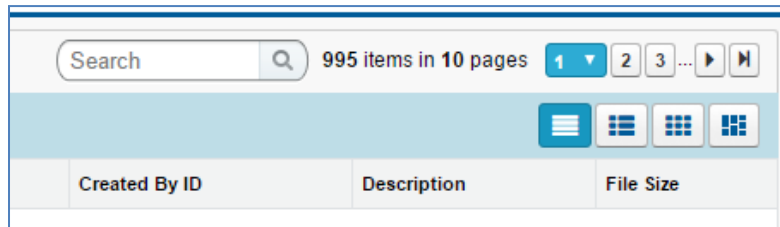


Figure 81

**(15) "Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 75-12 and Figure 82). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\*' (multiple characters), '?' (single character)' in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with an '*X Result(s) Found*' header and some buttons are disabled in the search results screen. You can go back to home by clicking '*Back to Home*' link on the left of the screen.

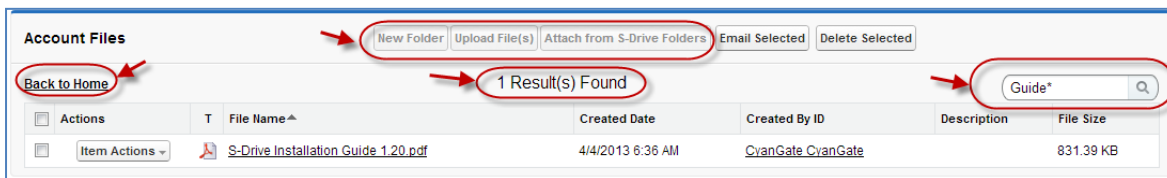


Figure 82

**(16) "View Type Buttons":** By using these buttons group (Figure 75-13), you can set the current view type as List, Thumbnail, Grid, and Card view. You can find more information under View Types Section.

**(17) "Actions Column":** Contains "Item Actions" button (Figure 75-14). Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 75-9).

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

**"Copy URL":** Used to copy the URL of the selected account file. After clicking this link a popup will appear along with the URL of the selected file (Figure 83). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy"

from the menu to copy the link to the clipboard (Figure 84). This item menu action is only for files and not available for folders.

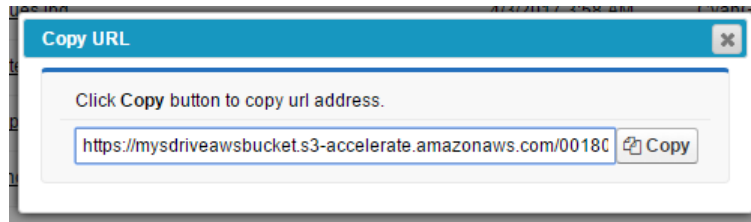


Figure 83

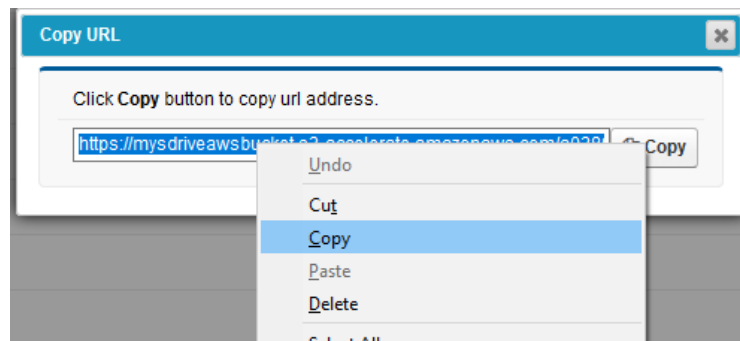


Figure 84

**"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 85) and you'll be able to edit current account file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

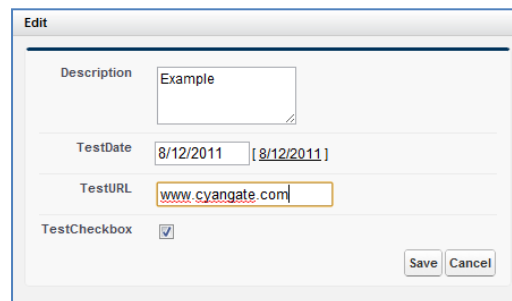


Figure 85

**"Rename"**: This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section for more information.

**"Delete "**: Used to delete selected account file/folder. After clicking this link, you'll get a warning message (Figure 80-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.



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

**"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 86). Only HTML Upload Manager supports version upload.

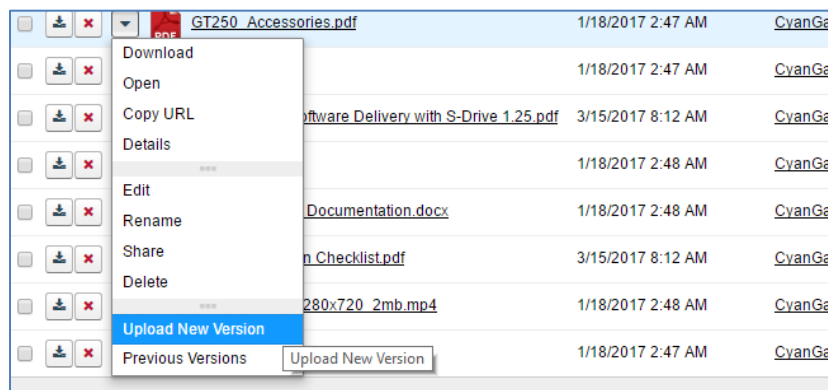


Figure 86

**"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 87).

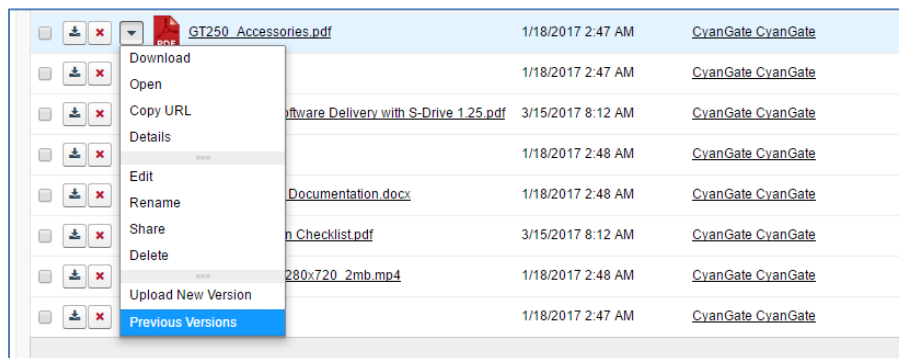


Figure 87

**"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 88).

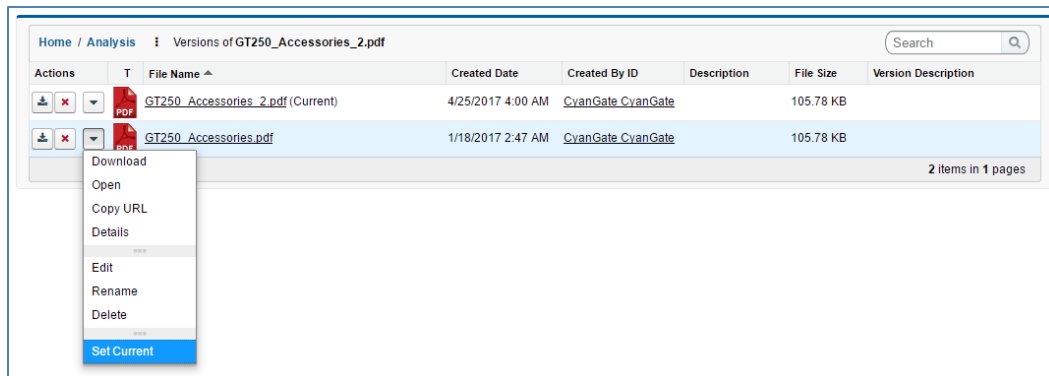


Figure 88

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.

**(18) "Content Type Column":** Displays a type icon based on the content type of the account file/folder (Figure 75-15).

**(19)"File Name Column":** File name information for the account files (Figure 75-16). You can sort files/folder ascending or descending by clicking the field header.

**(20)"Customizable Field Columns":** These sections are used to display customizable fields (Figure 75-17). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.



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

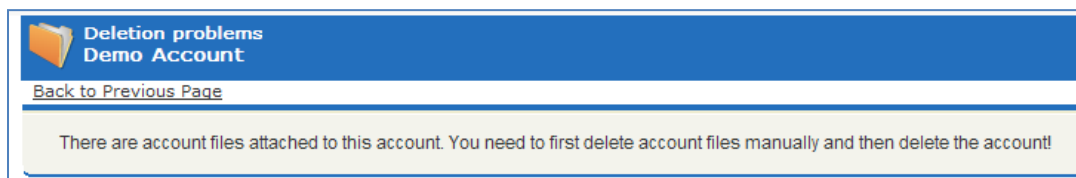


Figure 89

## 2. Contact Files

After installing S-Drive, if you made the configuration correctly you'll be able to create contact files in "Contacts" tab for each contact easily. Go to your "Contacts" tab, select a contact from the list (or create a new contact). If you can see the "Contact Files" page block in the current contact's page, you can keep on reading (Figure 90). Otherwise please consult to the "S-Drive Installation Guide" to activate "Contact Files" section.

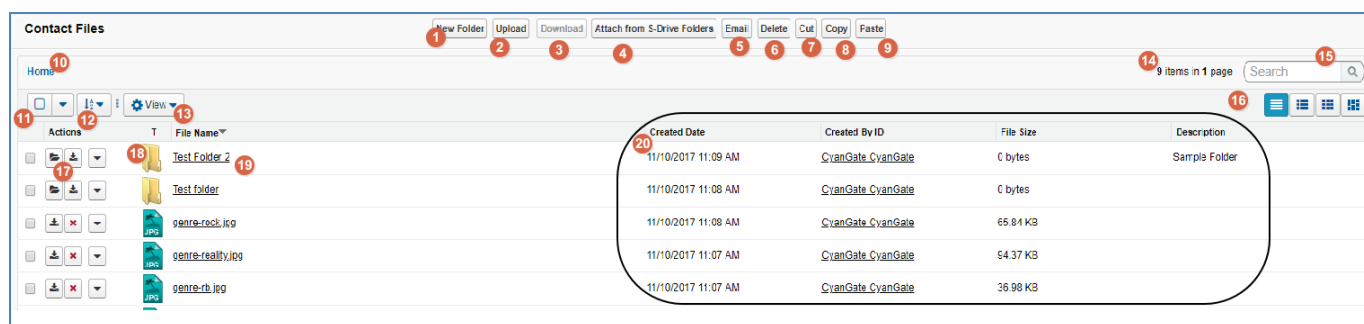


Figure 90

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 90-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 91).

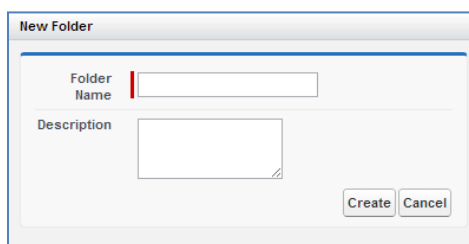


Figure 91

- (2) **"Upload File(s) Button"**: This button is used to add contact files to this contact (Figure 90-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 92).

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

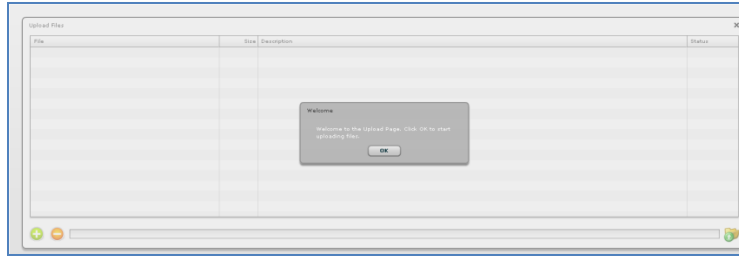


Figure 92

- (3) **"Download" Button:** Only when a file or folder selected, this button will be enable. If just one file selected, it directly starts to download file. If a folder or multi file selected, it prepare a zip file then starts to download it.
- (4) **"Attach from S-Drive Folders" Button:** This button is used to attach files from S-Drive Folders to this contact (Figure 90-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this contact (Figure 93-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 93-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed, and you can select more files to attach. If you select "No", page will be closed, and you'll be redirected to the contact page (Figure 93-C). "Cancel Attach" button also redirects you to the contact page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

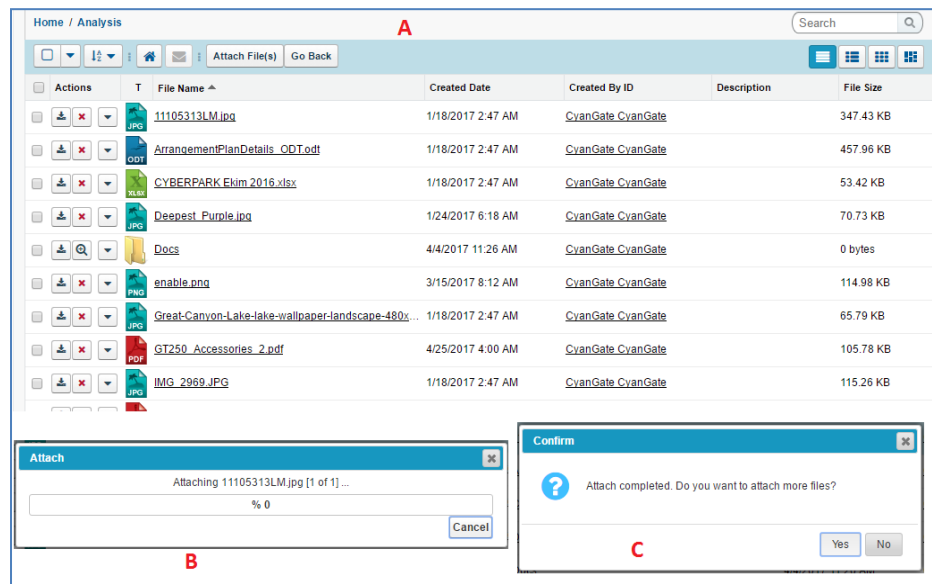


Figure 93



1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.

(5) **"Email" Button:** This button is used to email selected contact files (Figure 90-5). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying *"Please select file(s) to email!"* (Figure 94). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

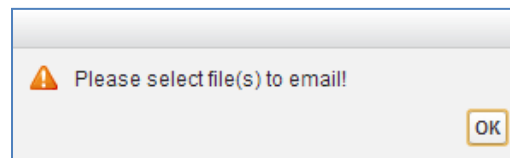


Figure 94

- (6) **"Delete Selected Button":** This button is used to delete selected contact files from current contact (Figure 90-6). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 95-A). Select "Yes" to delete, "Cancel" to

cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 95-B). If you click "Yes", delete process will start.

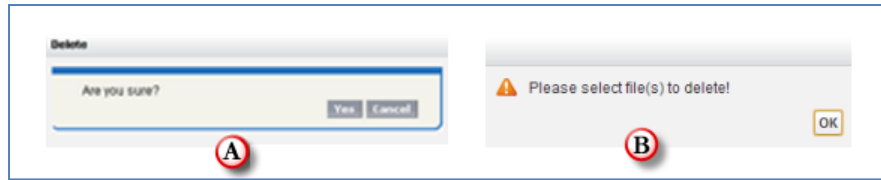


Figure 95



1. If you enabled versioning and have versions under the selected file, all versions of the selected file will also be deleted.
  - 2.
- (7) **"Cut Button"**: This button works for cutting selected file/files. There is no folder cut operation.
- (8) **"Copy Button"**: This button works for copying selected file/files. There is no folder copy operation.
- (9) **"Paste Button"**: This button works for pasting selected file/files. There is no folder paste operation.
- (10) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 90-7). You can click folders above to go to that folder.
- (11) **"Selection" Buttons**: (Figure 90-8)
- a. **Select All Combo Button**: By this button you can directly click select box to select/deselect all. Or you can use dropdown menu to select/deselect all.
  - b. **Select All Checkbox**: First of headers, there is a check all checkbox element.
  - c. **Select Row Checkbox**: For each row, there is a check box to select/deselect row on it.
- (12) **"Order By" Dropdown Button**: Using this dropdown button you can reorder list by clicking field names inside the menu (Figure 90-9). If you click same field on the menu again, sorting order will change from ASC to DESC or vice versa.
- (13) **"View Settings" Dropdown Button**: By this button (Figure 90-10), you can set current view type as default for the object you are on. i.e. you can set Contact Objects default view type as Grid View type. Whenever you open an Contact object you see FileList in Grid style viewed. You can also set current order field and type as default orders.
- (14) **"Total Items / Pagination"**: Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 90-11). If item (file/folder)

count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 96). 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 2<sup>nd</sup> page.

Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

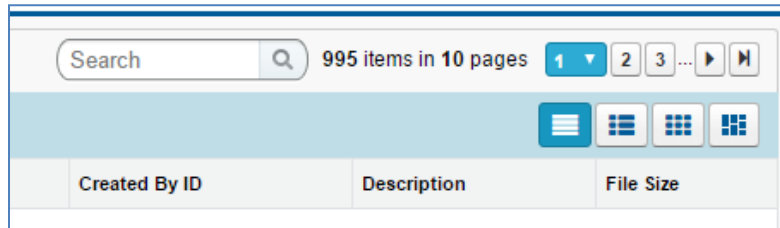


Figure 96

**(15) "Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 90-12 and Figure 97). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\*' (multiple characters), '?' (single character)' in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with an '*X Result(s) Found*' header and some buttons are disabled in the search results screen. You can go back to home by clicking '*Back to Home*' link on the left of the screen.

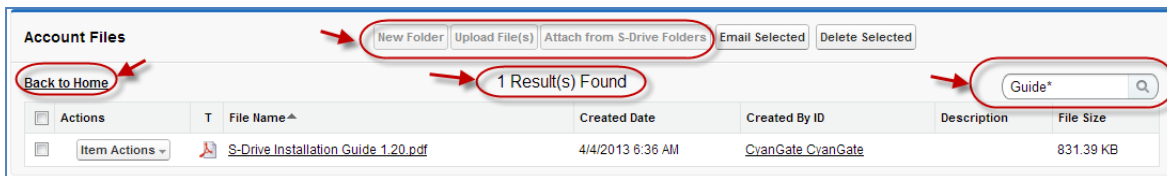


Figure 97

**(16) "View Type Buttons":** By using these buttons group (Figure 90-13), you can set the current view type as List, Thumbnail, Grid, and Card view. You can find more information under View Types Section.

**(17) "Actions Column":** Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 90-14).

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

**"Copy URL":** Used to copy the URL of the selected contact file. After clicking this link a popup will appear along with the URL of the selected file (Figure 98). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy"

from the menu to copy the link to the clipboard (Figure 99). This item menu action is only for files and not available for folders.

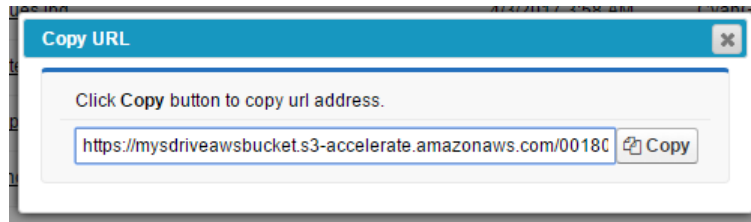


Figure 98

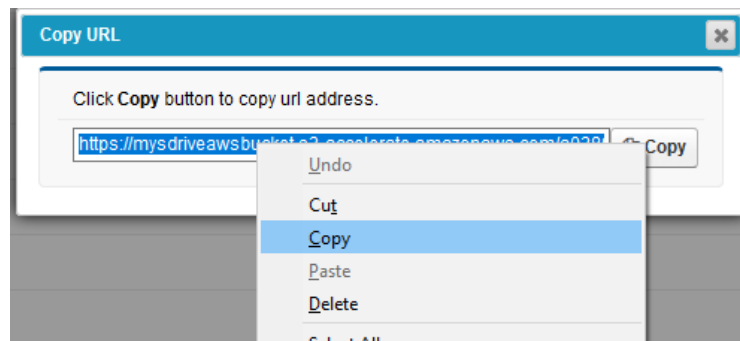


Figure 99

**"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 100) and you'll be able to edit current contact file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

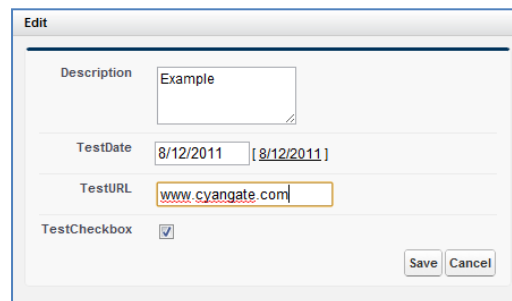


Figure 100

**"Rename"**: This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section for more information.

**"Delete "**: 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. Note that you cannot delete folders that contain files or subfolders.



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

**"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 101). Only HTML Upload Manager supports version upload.

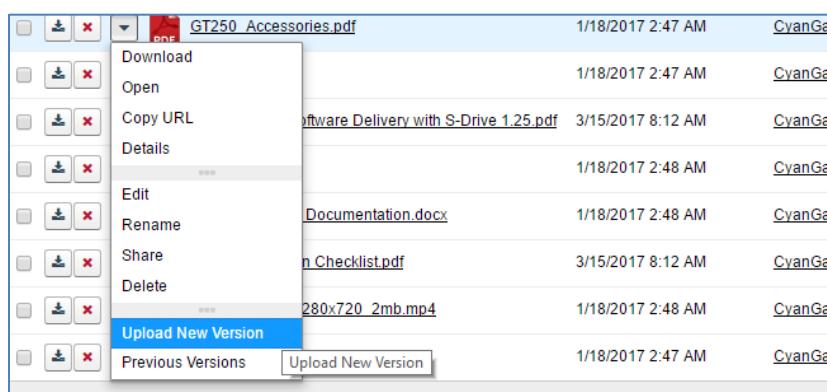


Figure 101

**"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 102).

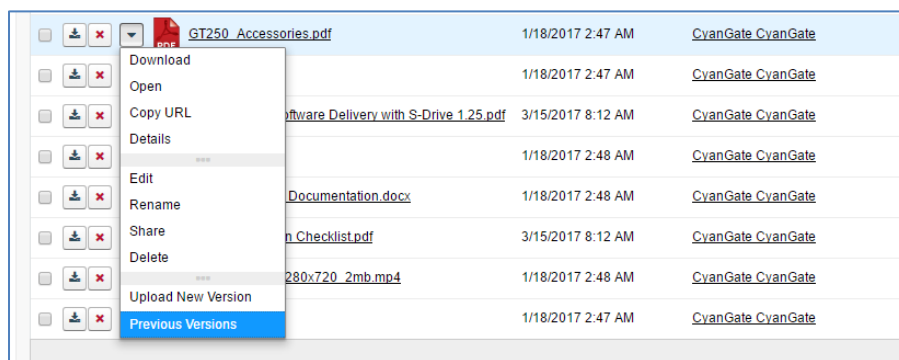


Figure 102

**"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 103).

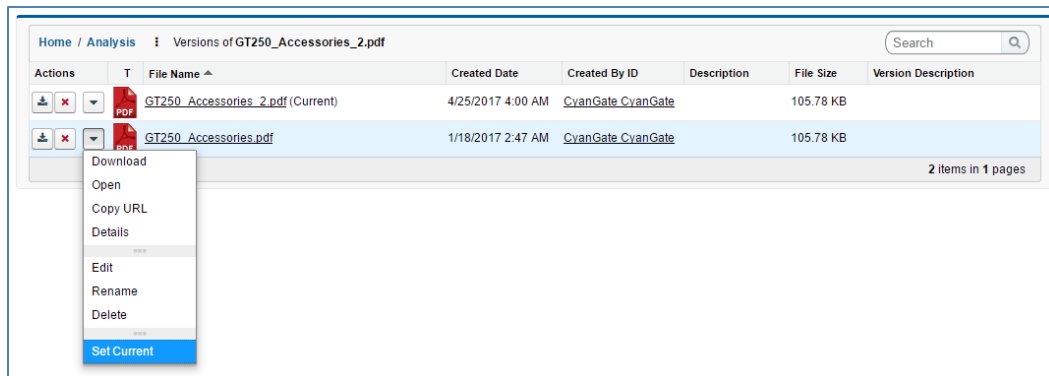


Figure 103

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.

**(18) "Content Type Column":** Displays a type icon based on the content type of the contact file/folder (Figure 90-15).

**(19)"File Name Column":** File name information for the contact files (Figure 90-16). You can sort files/folder ascending or descending by clicking the field header.

**(20)"Customizable Field Columns":** These sections are used to display customizable fields (Figure 90-17). Your Salesforce.com contact's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.



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

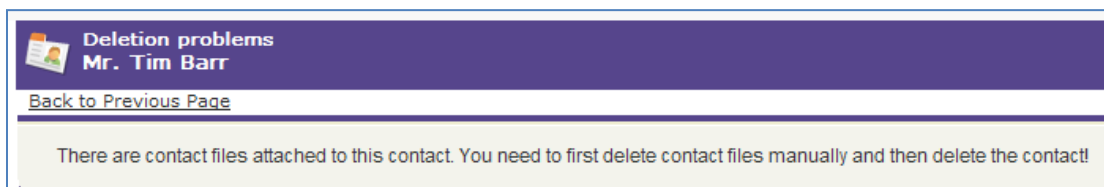


Figure 104

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

### 3. Opportunity Files

After installing S-Drive, if you made the configuration correctly you'll be able to create opportunity files in "Opportunities" tab for each opportunity easily. Go to your "Opportunities" tab, select an opportunity from the list (or create a new opportunity). If you can see the "Opportunity Files" page block in the current opportunity's page, you can keep on reading (Figure 105). Otherwise please consult to the "S-Drive Installation Guide" to activate "Opportunity Files" section.

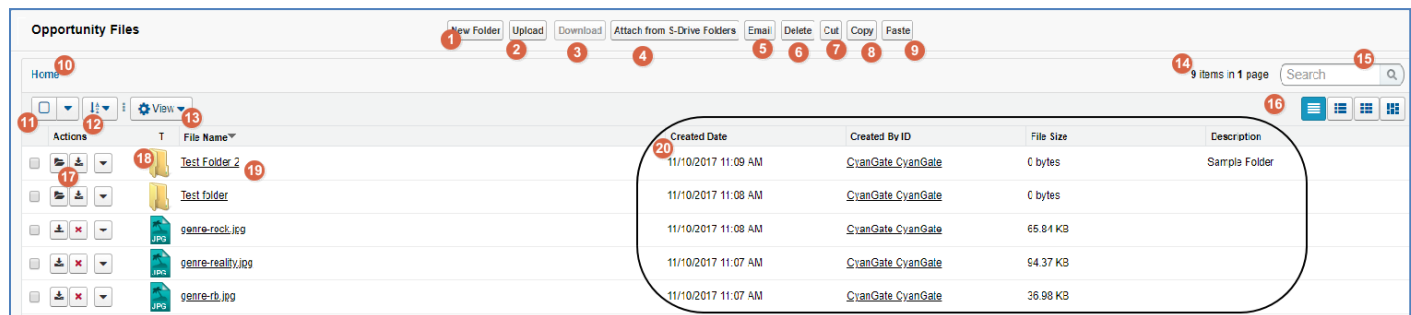


Figure 105

1. **"New Folder Button"**: This button is used to create new folders (Figure 105-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 106).

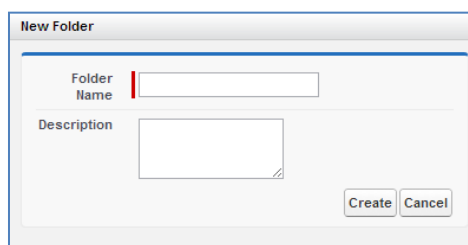


Figure 106

2. **"Upload File(s) Button"**: This button is used to add opportunity files to this opportunity (Figure 75-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 107).

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

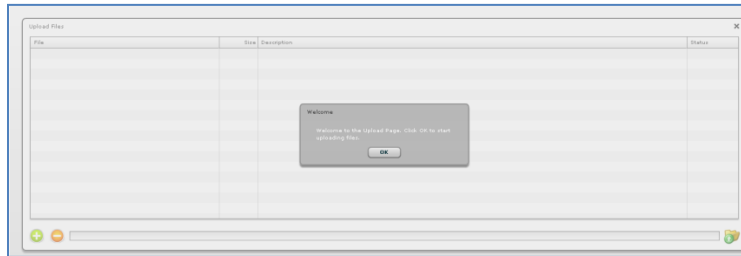


Figure 107

3. **"Download" Button:** Only when a file or folder selected, this button will be enable. If just one file selected, it directly starts to download file. If a folder or multi file selected, it prepare a zip file then starts to download it.
4. **"Attach from S-Drive Folders" Button:** This button is used to attach files from S-Drive Folders to this opportunity (Figure 75-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this opportunity (Figure 108-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 108-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed, and you can select more files to attach. If you select "No", page will be closed, and you'll be redirected to the opportunity page (Figure 108-C). "Cancel Attach" button also redirects you to the opportunity page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

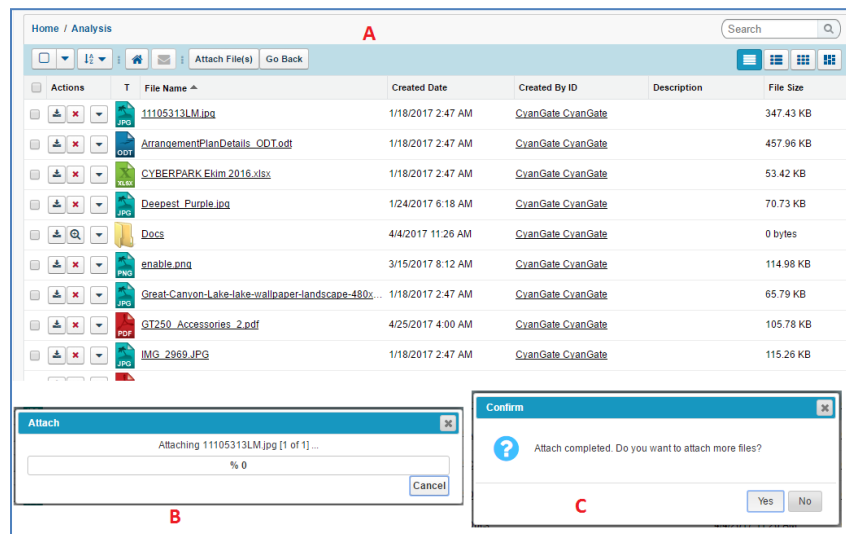


Figure 108



1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.
5. **"Email" Button:** This button is used to email selected opportunity files (Figure 75-5). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying *"Please select file(s) to email!"* (Figure 109). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

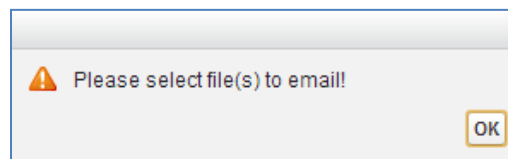


Figure 109

6. **"Delete Selected Button":** This button is used to delete selected opportunity files from current opportunity (Figure 75-6). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 110-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 110-B). If you click "Yes", delete process will start.

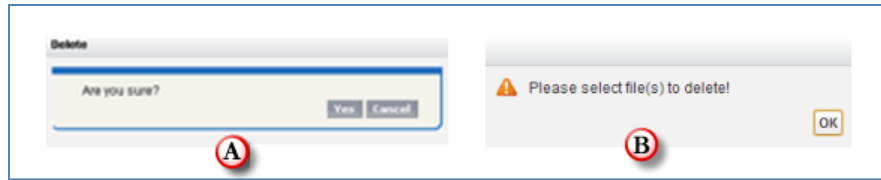


Figure 110



### Notes

1. If you enabled versioning and have versions under the selected file, all versions of the selected file will also be deleted.
7. **"Cut Button"**: This button works for cutting selected file/files. There is no folder cut operation.
8. **"Copy Button"**: This button works for copying selected file/files. There is no folder copy operation.
9. **"Paste Button"**: This button works for pasting selected file/files. There is no folder paste operation.
10. **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 75-7). You can click folders above to go to that folder.
11. **"Selection" Buttons**:
  - a. **Select All Combo Button**: By this button you can directly click select box to select/deselect all. Or you can use dropdown menu to select/deselect all.
  - b. **Select All Checkbox**: First of headers, there is a check all checkbox element.
  - c. **Select Row Checkbox**: For each row, there is a check box to select/deselect row on it.
12. **"Order By" Dropdown Button**: Using this dropdown button you can reorder list by clicking field names inside the menu. If you click same field on the menu again, sorting order will change from ASC to DESC or vice versa.
13. **"View Settings" Dropdown Button**: By this button, you can set current view type as default for the object you are on. i.e. you can set Opportunity Objects default view type as Grid View type. Whenever you open an Opportunity object you see FileList in Grid style viewed. You can also set current order field and type as default orders.
14. **"Total Items / Pagination"**: Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 75-11). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 111). 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 2<sup>nd</sup> page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

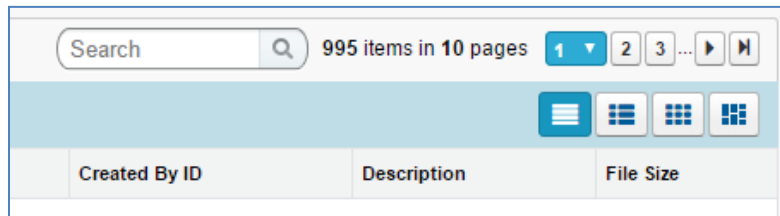


Figure 111

15. **"Search Box"**: You can search for files and folders inside S-Drive Attachments (Figure 75-12 and Figure 112). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\*' (multiple characters), '?' (single character)' in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with an '*X Result(s) Found*' header and some buttons are disabled in the search results screen. You can go back to home by clicking '*Back to Home*' link on the left of the screen.

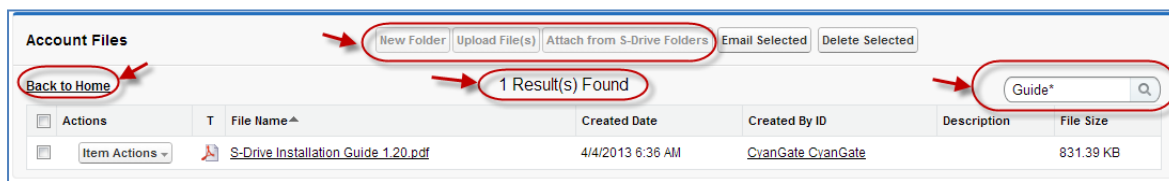


Figure 112

16. **"View Type Buttons"**: By using these buttons group, you can set the current view type as List, Thumbnail, Grid, and Card view. You can find more information under View Types Section.
17. **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 75-14).

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

**"Copy URL"**: Used to copy the URL of the selected opportunity file. After clicking this link a popup will appear along with the URL of the selected file (Figure 113). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 114). This item menu action is only for files and not available for folders.

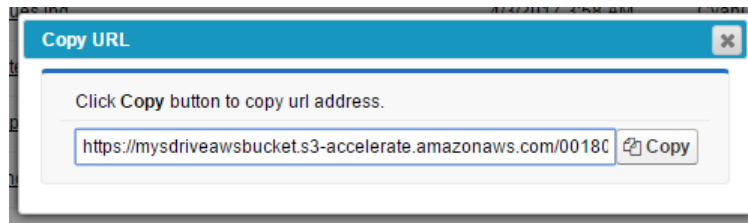


Figure 113

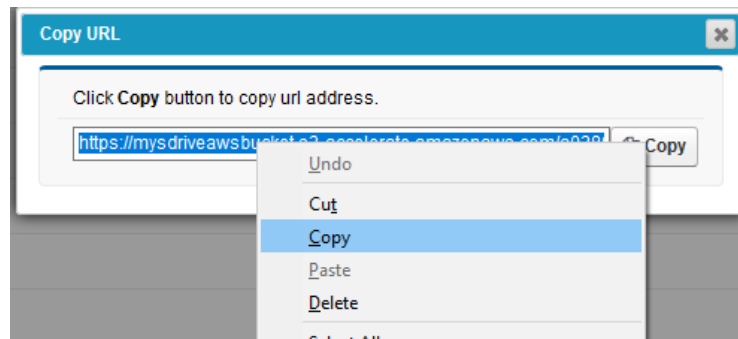


Figure 114

**"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 115) and you'll be able to edit current opportunity file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

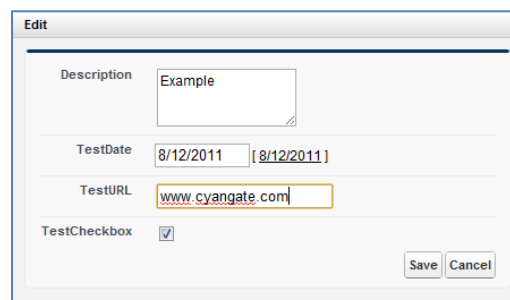


Figure 115

**"Rename"**: This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section for more information.

**"Delete"**: 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. Note that you cannot delete folders that contain files or subfolders.



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

**"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 116). Only HTML Upload Manager supports version upload.

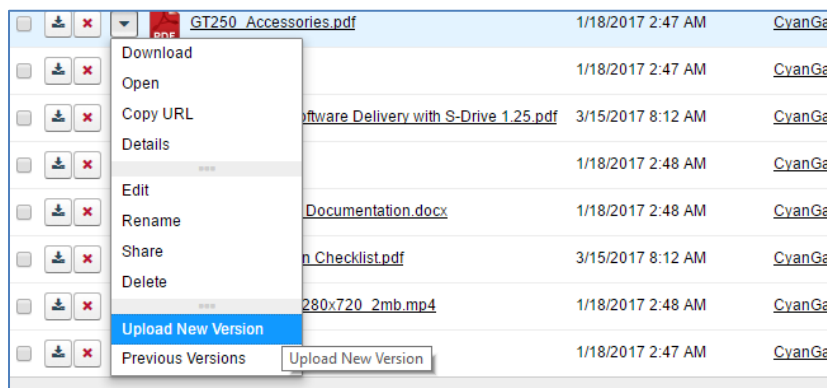


Figure 116

**"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 117).

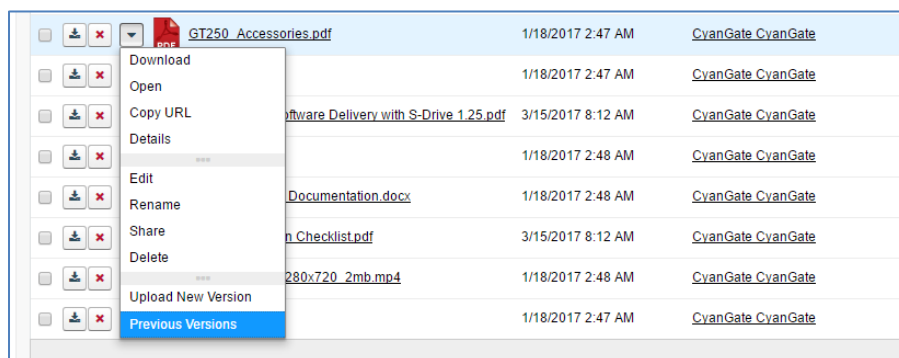


Figure 117

**"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 118).



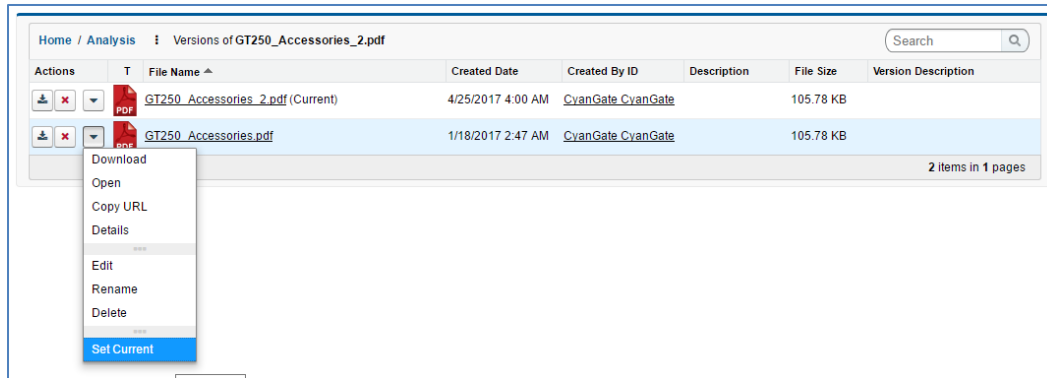


Figure 118

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.

18. **"Content Type Column"**: Displays a type icon based on the content type of the opportunity file/folder (Figure 75-15).
19. **"File Name Column"**: File name information for the opportunity files (Figure 75-16). You can sort files/folder ascending or descending by clicking the field header.
20. **"Customizable Field Columns"**: These sections are used to display customizable fields (Figure 75-17). Your Salesforce.com opportunity's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.



1. You cannot delete an opportunity which has opportunity files attached. You'll get an error message if you try to delete this kind of opportunity (Figure 119). You need to delete opportunity files first, and then you can delete the opportunity.

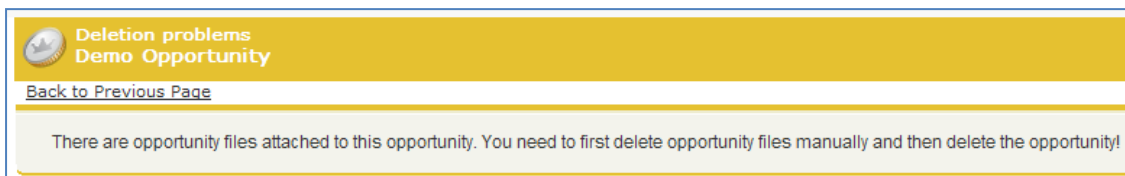


Figure 119

## 4. Case Files

After installing S-Drive, if you made the configuration correctly you'll be able to create case files in "Cases" tab for each case easily. Go to your "Cases" tab, select a case from the list (or create a new case). If you can see the "Case Files" page block in the current case's page, you can keep on reading (Figure 120). Otherwise please consult to the "S-Drive Installation Guide" to activate "Case Files" section.

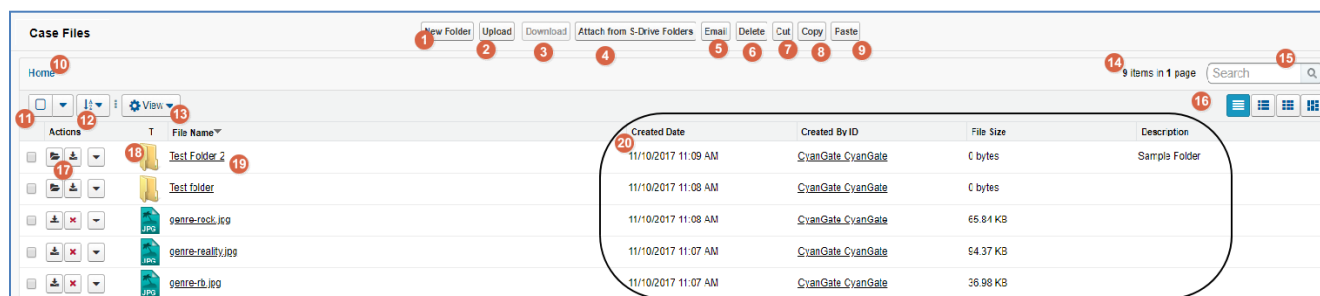


Figure 120

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 75-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 121).

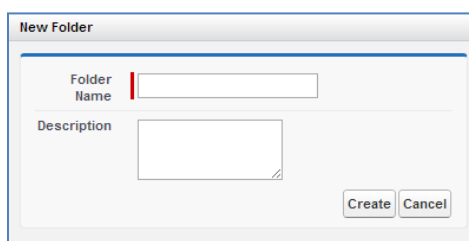


Figure 121

- (2) **"Upload File(s) Button"**: This button is used to add case files to this case (Figure 75-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 122).

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

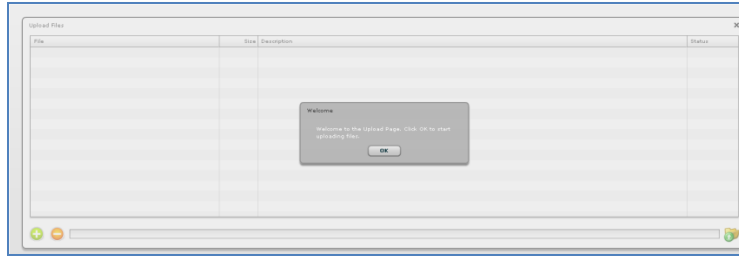


Figure 122

- (3) **"Download" Button:** Only when a file or folder selected, this button will be enable (Figure 75-3). If just one file selected, it directly starts to download file. If a folder or multi file selected, it prepares a zip file then starts to download it.
- (4) **"Attach from S-Drive Folders" Button:** This button is used to attach files from S-Drive Folders to this case (Figure 75-4). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this case (Figure 123-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 123-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed, and you can select more files to attach. If you select "No", page will be closed, and you'll be redirected to the case page (Figure 123-C). "Cancel Attach" button also redirects you to the case page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

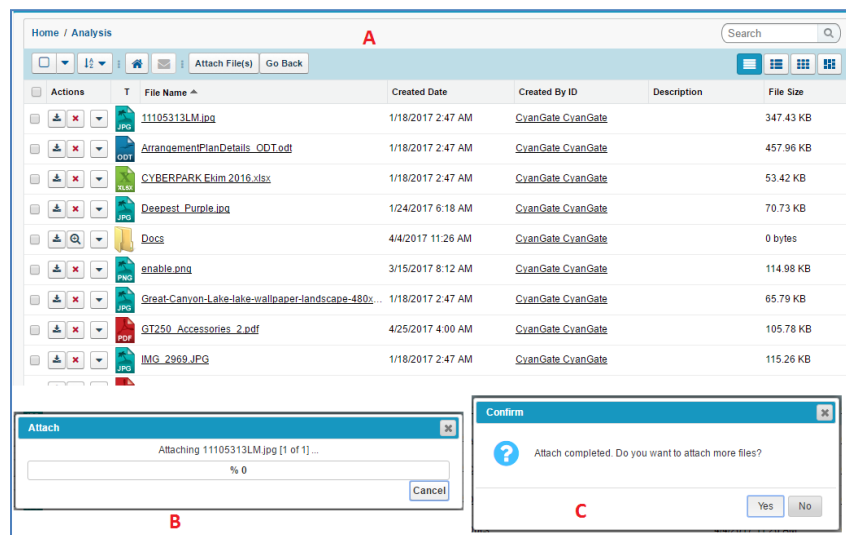


Figure 123



1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.

**(5) "Email" Button:** This button is used to email selected case files (Figure 75-5). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying *"Please select file(s) to email!"* (Figure 124). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

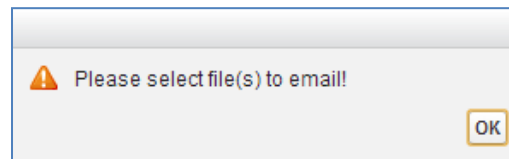


Figure 124

**(6) "Delete Selected Button":** This button is used to delete selected case files from current case (Figure 75-6). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 125-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 125-B). If you click "Yes", delete process will start.

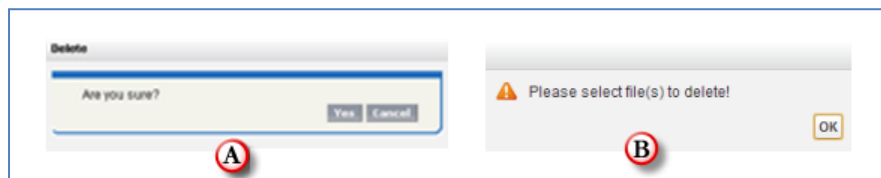


Figure 125



1. If you enabled versioning and have versions under the selected file, all versions of the selected file will also be deleted.
- (7) "Cut Button":** This button works for cutting selected file/files. There is no folder cut operation.
- (8) "Copy Button":** This button works for copying selected file/files. There is no folder copy operation.
- (9) "Paste Button":** This button works for pasting selected file/files. There is no folder paste operation.

**(10)"Current Folder Information Holder":** Used to display where the current files/folder are in the hierarchy (Figure 75-7). You can click folders above to go to that folder.

**(11)"Selection" Buttons:**

- Select All Combo Button:** By this button you can directly click select box to select/deselect all. Or you can use dropdown menu to select/deselect all.
- Select All Checkbox:** First of headers, there is a check all checkbox element.
- Select Row Checkbox:** For each row, there is a check box to select/deselect row on it.

**(12)"Order By" Dropdown Button:** Using this dropdown button you can reorder list by clicking field names inside the menu. If you click same field on the menu again, sorting order will change from ASC to DESC or vice versa.

**(13) "View Settings" Dropdown Button:** By this button, you can set current view type as default for the object you are on. i.e. you can set Case Objects default view type as Grid View type. Whenever you open an Case object you see FileList in Grid style viewed. You can also set current order field and type as default orders.

**(14)"Total Items / Pagination":** Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 75-11). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 126). 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 2<sup>nd</sup> page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

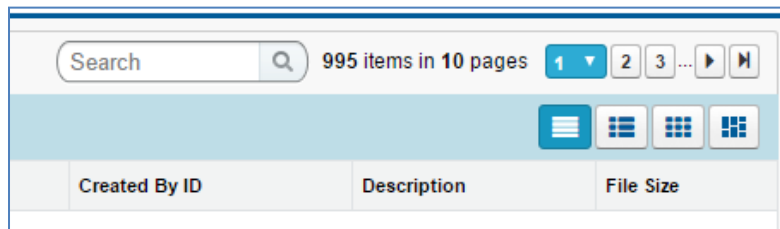


Figure 126

**(15)"Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 75-12 and Figure 127). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\*' (multiple characters), '?' (single character)' in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with an '*X Result(s) Found*' header and some buttons are disabled in the search results screen. You can go back to home by clicking '*Back to Home*' link on the left of the screen.

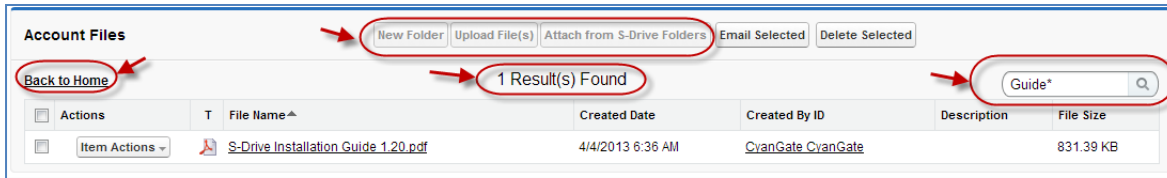


Figure 127

**(16) "View Type Buttons":** By using these buttons group, you can set the current view type as List, Thumbnail, Grid, and Card view. You can find more information under View Types Section.

**(17)"Actions Column":** Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 75-14).

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

**"Copy URL":** Used to copy the URL of the selected case file. After clicking this link a popup will appear along with the URL of the selected file (Figure 128). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 129). This item menu action is only for files and not available for folders.

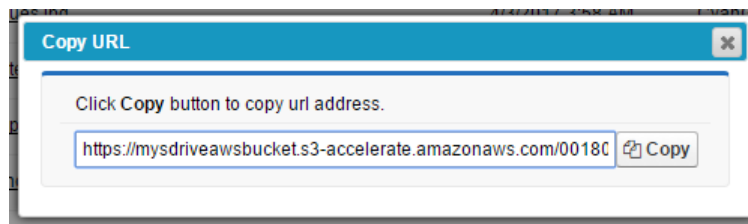


Figure 128

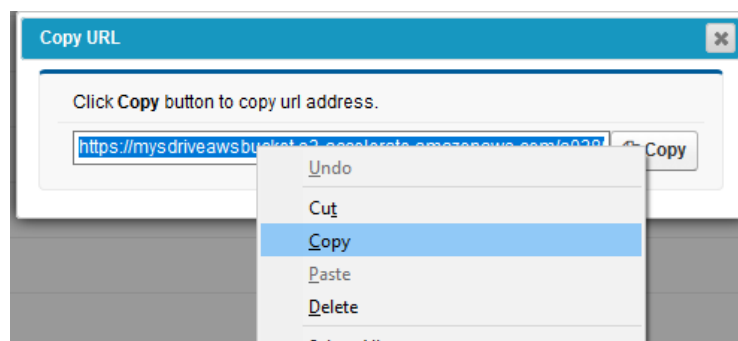


Figure 129

**"Edit":** Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 130) and you'll be able to edit current case file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

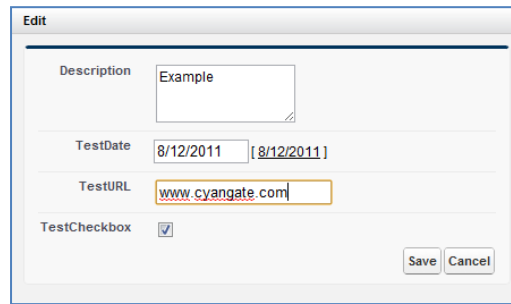


Figure 130

**"Rename"**: This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section for more information.

**"Delete"**: 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. Note that you cannot delete folders that contain files or subfolders.



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

**"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 131). Only HTML Upload Manager supports version upload.

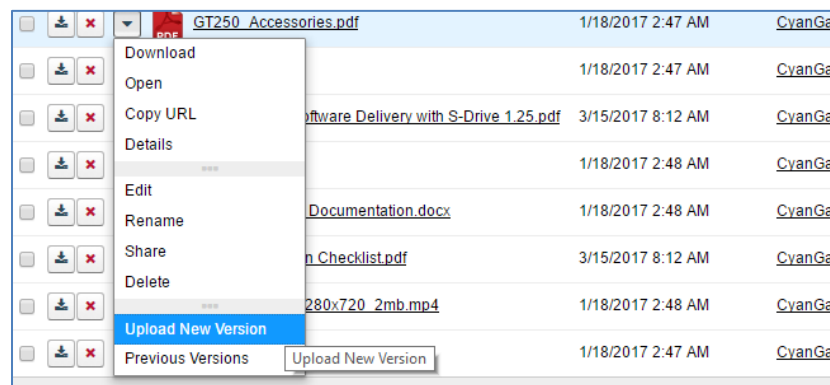


Figure 131

**"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 132).

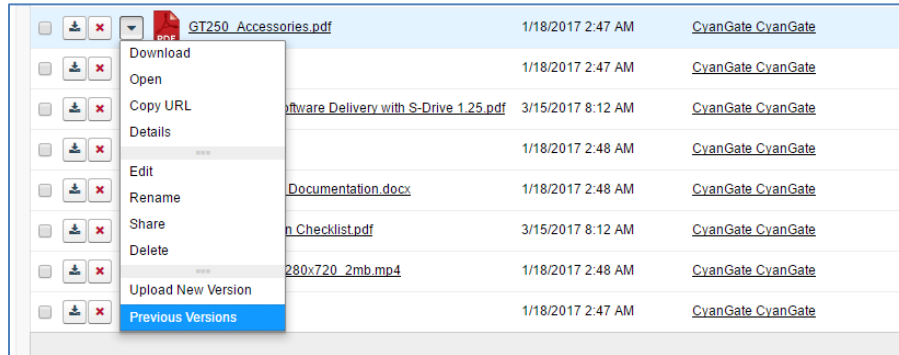


Figure 132

**"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 133).

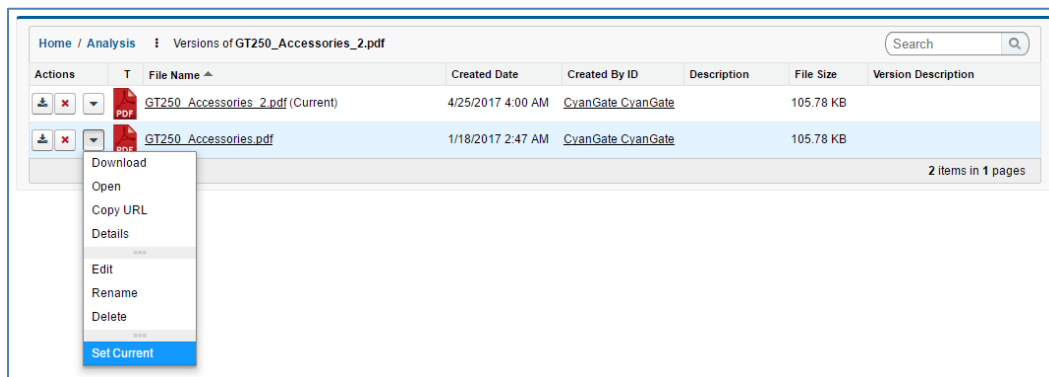


Figure 133

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.

**(18) "Content Type Column":** Displays a type icon based on the content type of the case file/folder (Figure 75-15).

**(19)"File Name Column":** File name information for the case files (Figure 75-16). You can sort files/folder ascending or descending by clicking the field header.

**(20)"Customizable Field Columns":** These sections are used to display customizable fields (Figure 75-17). Your Salesforce.com case's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date",



"Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.



1. You cannot delete a case which has case files attached. You'll get an error message if you try to delete this kind of case (Figure 134). You need to delete case files first, and then you can delete the case.

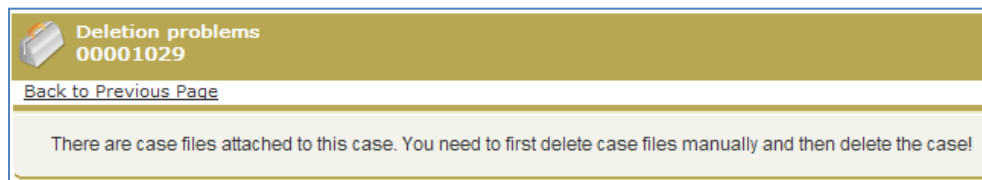


Figure 134

2. You can use "Case Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Advanced Configuration Guide* for more information), your customers can add case files to cases using "Customer Portal Interface" (Figure 135).

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

Figure 135

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

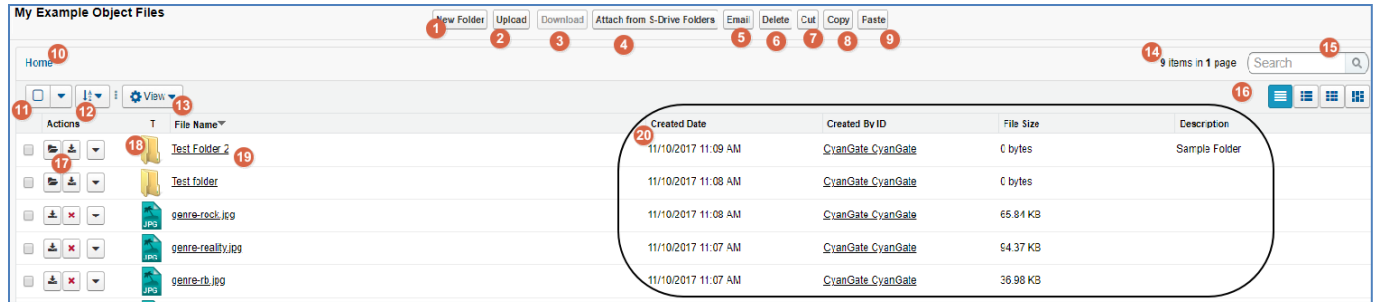


Figure 136

- (1) **"New Folder Button"**: This button is used to create new folders (Figure 136-1). When you click the button, "New Folder" screen will be opened and you'll be able to create a folder by typing its name (mandatory) and description (optional). You can create the folder by clicking "Create" button (Figure 137).

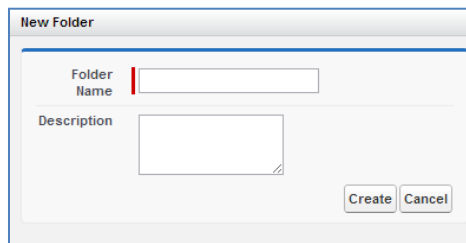


Figure 137

- (2) **"Upload File(s) Button"**: This button is used to add case files to this case (Figure 75-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 77).

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

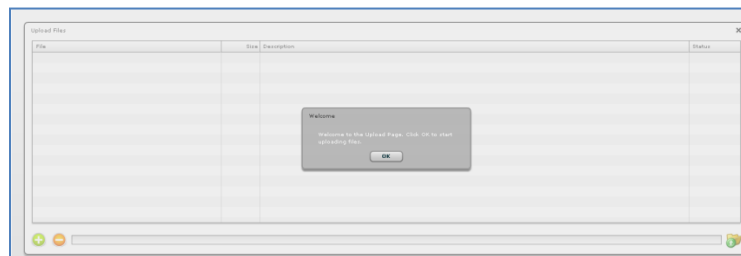


Figure 138

- (3) **"Download" Button**: Only when a file or folder selected, this button will be enable. If just one file selected, it directly starts to download file. If a folder or multi file selected, it prepare a zip

file then starts to download it.

- (4) **"Attach from S-Drive Folders" Button:** This button is used to attach files from S-Drive Folders to this case (Figure 75-4). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this case (Figure 78-A). You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.

You can see the attach progress, once you click "Attach File(s)" button (Figure 78-B). After completion of the attach process, you'll be asked: "Attach completed. Do you want to attach more files?" If you select "Yes", message will be closed, and you can select more files to attach. If you select "No", page will be closed, and you'll be redirected to the case page (Figure 78-C). "Cancel Attach" button also redirects you to the case page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. "Attach from S-Drive Folders" button is not available for customer portal users.

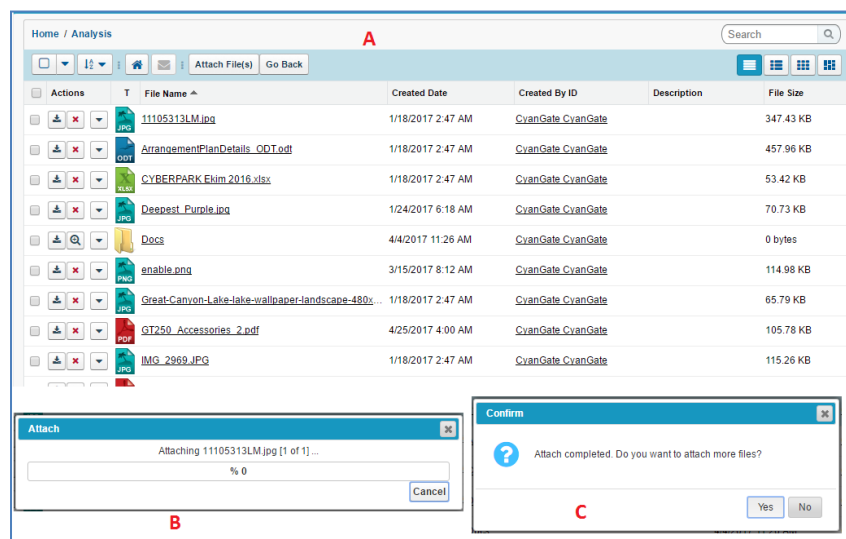


Figure 139



1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.

- (5) **"Email" Button:** This button is used to email selected case files (Figure 75-5). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. If you do not select any files and click "Email Selected" button, you'll get a warning message saying *"Please select file(s) to email!"* (Figure 79). After making selections and clicking the "Email Selected"

button, "Email Files" screen will be opened. This screen is similar to the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.

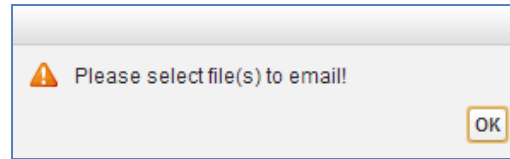


Figure 140

- (6) **"Delete Selected Button"**: This button is used to delete selected case files from current case (Figure 75-6). To use this button, you need to select one or more files using "Select Single Item" or "Select All" options. After making selections and clicking the "Delete Selected" button, you'll be warned if you are sure or not (Figure 80-A). Select "Yes" to delete, "Cancel" to cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 80-B). If you click "Yes", delete process will start.

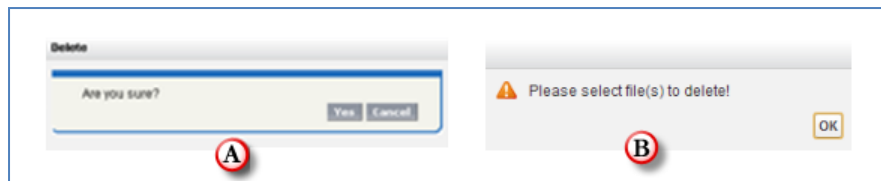


Figure 141



#### Notes

1. If you enabled versioning and have versions under the selected file, all versions of the selected file will also be deleted.
- (7) **"Cut Button"**: This button works for cutting selected file/files. There is no folder cut operation.
- (8) **"Copy Button"**: This button works for copying selected file/files. There is no folder copy operation.
- (9) **"Paste Button"**: This button works for pasting selected file/files. There is no folder paste operation.
- (10) **"Current Folder Information Holder"**: Used to display where the current files/folder are in the hierarchy (Figure 75-7). You can click folders above to go to that folder.
- (11) **"Selection" Buttons**:
- a. **Select All Combo Button**: By this button you can directly click select box to select/deselect all. Or you can use dropdown menu to select/deselect all.
  - b. **Select All Checkbox**: First of headers, there is a check all checkbox element.
  - c. **Select Row Checkbox**: For each row, there is a check box to select/deselect row on it.

- (12) **“Order By” Dropdown Button:** Using this dropdown button you can reorder list by clicking field names inside the menu. If you click same field on the menu again, sorting order will change from ASC to DESC or vice versa.
- (13) **“View Settings” Dropdown Button:** By this button, you can set current view type as default for the object you are on. i.e. you can set Case Objects default view type as Grid View type. Whenever you open an Case object you see FileList in Grid style viewed. You can also set current order field and type as default orders.
- (14) **“Total Items / Pagination”:** Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 75-11). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 81). 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 2<sup>nd</sup> page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.

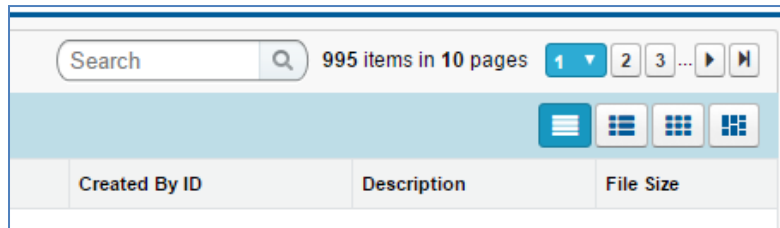


Figure 142

- (15) **“Search Box”:** You can search for files and folders inside S-Drive Attachments (Figure 75-12 and Figure 82). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, ‘\*’ (multiple characters), ‘?’ (single character)’ in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with an ‘X Result(s) Found’ header and some buttons are disabled in the search results screen. You can go back to home by clicking ‘Back to Home’ link on the left of the screen.

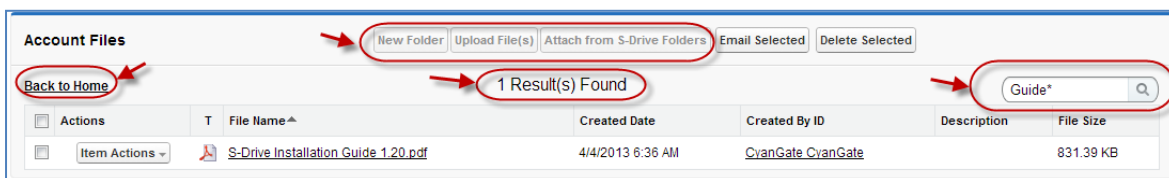


Figure 143

- (16) **“View Type Buttons”:** By using these buttons group, you can set the current view type as List, Thumbnail, Grid, and Card view. You can find more information under View Types Section.

(17) **"Actions Column"**: Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 75-14).

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

**"Copy URL"**: Used to copy the URL of the selected case file. After clicking this link a popup will appear along with the URL of the selected file (Figure 83). First you need to click the "Select URL" button; this will highlight the URL, then right click the highlighted text and select "Copy" from the menu to copy the link to the clipboard (Figure 84). This item menu action is only for files and not available for folders.

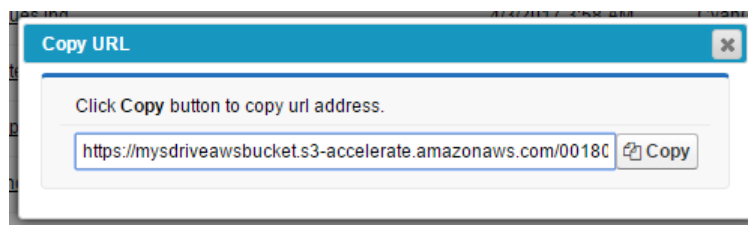


Figure 144

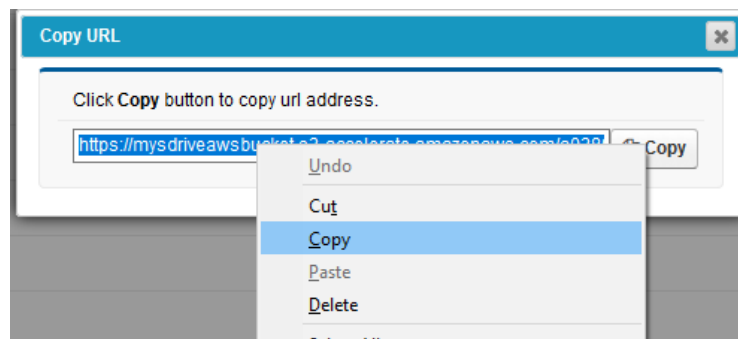


Figure 145

**"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 85) and you'll be able to edit current case file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", edit process will start. You can click "Cancel" to cancel the edit operation.

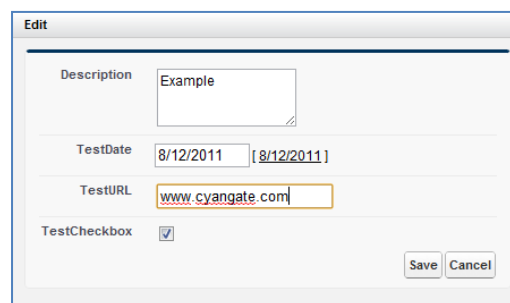


Figure 146

**"Rename":** This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item. See "Renaming Files & Folders" section for more information.

**"Delete ":** Used to delete selected case file/folder. After clicking this link, you'll get a warning message (Figure 80-A). Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start. Note that you cannot delete folders that contain files or subfolders.



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

**"Upload New Version":** 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 147). Only HTML Upload Manager supports version upload.

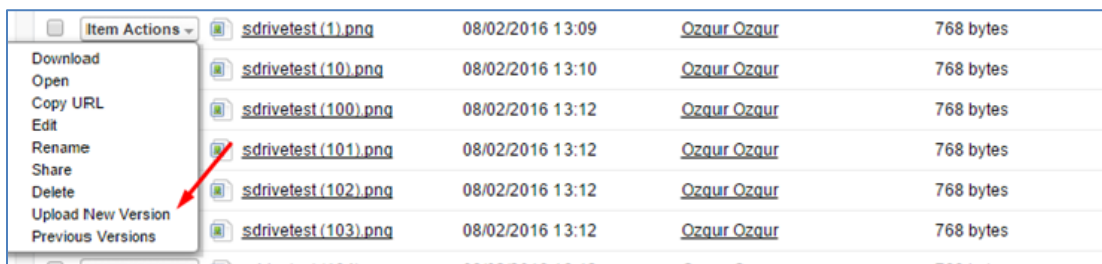


Figure 147

**"Previous Versions":** 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 148). First, you should enable version upload from S-Drive Configuration Tab to see "Previous Versions" item in menu. Once you enable versioning, you can't disable it.

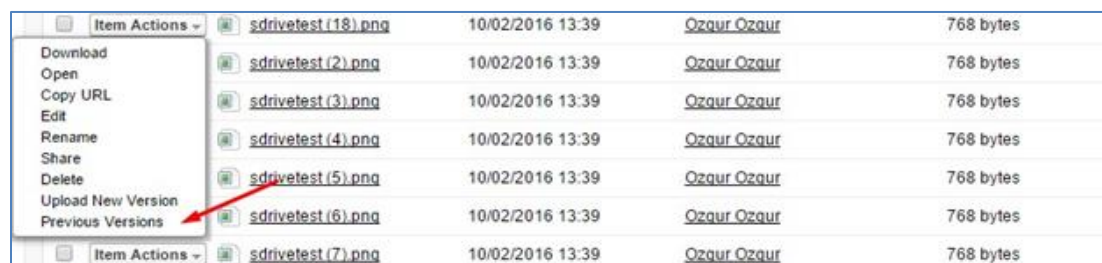


Figure 148

**"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 149).



Figure 149

- (1) **"Content Type Column"**: Displays a type icon based on the content type of the custom object file/folder files (Figure 136-1).
- (2) **"File Name Column"**: File name information for the object files (Figure 136-2). You can sort files/folder ascending or descending by clicking the field.
- (3) **"Customizable Field Columns"**: These sections are used to display customizable fields (Figure 136-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.
- (4) **"Total Items / Pagination"**: Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 136-4). If item (file/folder) count in a folder is greater than 100 (configurable), items are displayed with pagination and total items are displayed next to the page numbers (Figure 81). 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 2<sup>nd</sup> page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
- (5) **"Search Box"**: You can search for files and folders inside S-Drive Attachments (Figure 136-5 and Figure 82). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '\*' (multiple characters), '?' (single character) in search keywords. For example: *exam\**, *boo?* etc. Results are displayed in the same section with a '*X Result(s) Found*' header and some buttons are disabled in the search results screen. You can go back to home by clicking '*Back to Home*' link on the left of the screen.
- (6) **"Private"**: This checkbox is used to determine if the individual S-Drive attachment will be visible to the customer portal users (Figure 136-6). If the attachment is set to private, customer portal



users won't be able to see the private file. File can be set to private/public in Upload Screen before uploading or anytime from Edit Screen. See *"S-Drive Advanced Configuration Guide—Creating Custom Object Files"* section for more information about the public/private flag.

- (7) **"Download Manager"**: This button is used to download files using Download Manager (Figure 136-7). See *"Download Manager Download"* section for more information about download manager.



1. If your system administrator set a before delete trigger for your object you cannot delete an object which has object files attached. You'll get an error message if you try to delete this kind of object (Figure 150). You need to delete object files first, and then you can delete the object.

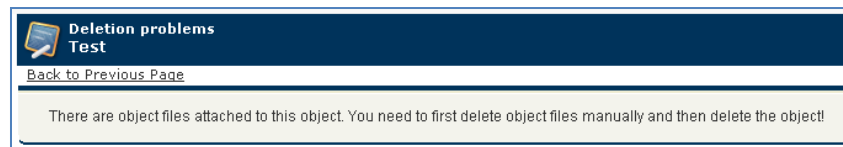


Figure 150

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".

## V. S-Drive Advanced Search

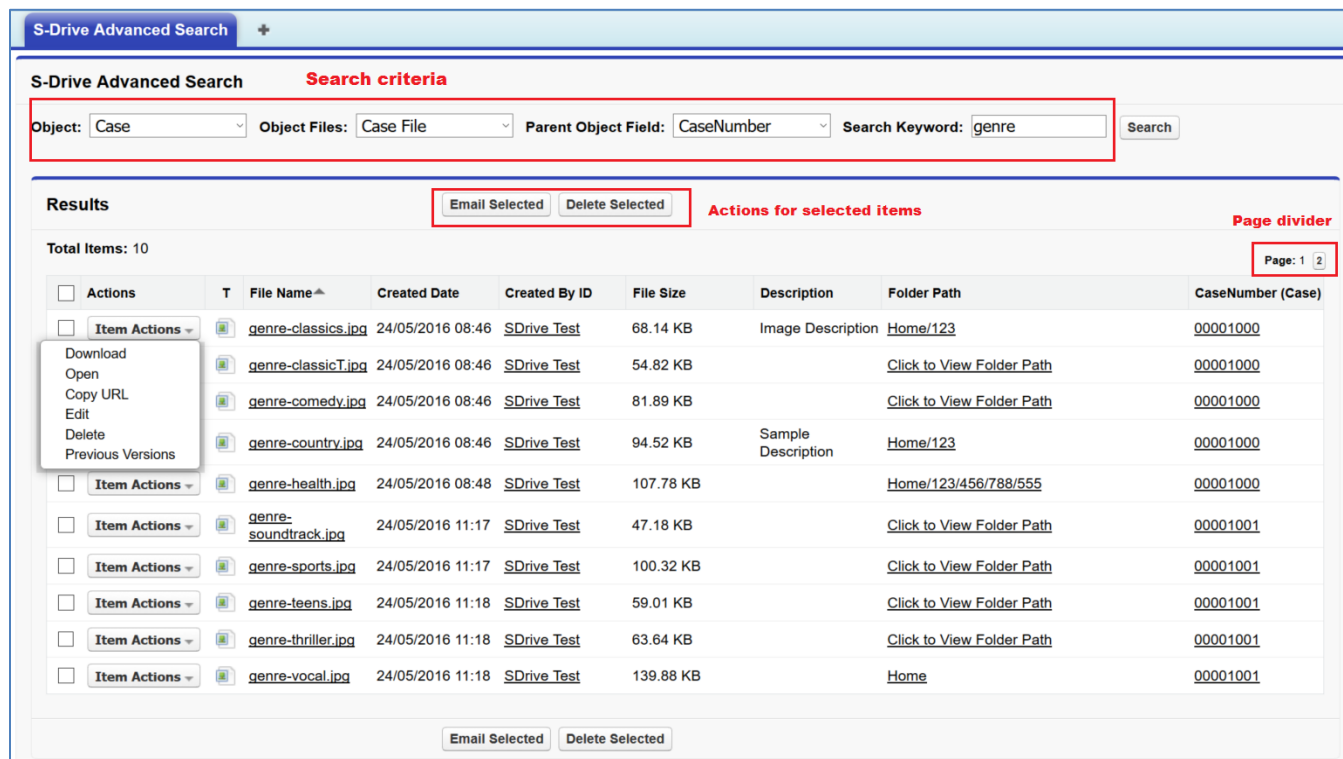
S-Drive Advanced Search is a new feature of S-Drive that helps to perform improved search functionality in object files. AdvancedSearchPage and AdvancedSearchComponent created for that. You can use AdvancedSearchComponent with your own VF pages. You can access to this feature using S-Drive Advanced Search 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 151).



The screenshot displays the S-Drive Advanced Search interface. At the top, there's a tab labeled "S-Drive Advanced Search". Below it, the "Search criteria" section includes dropdowns for "Object" (set to "Case"), "Object Files" (set to "Case File"), "Parent Object Field" (set to "CaseNumber"), and a "Search Keyword" field containing "genre". A "Search" button is to the right. Below the search criteria, the "Results" section shows "Total Items: 10". A red box highlights the "Email Selected" and "Delete Selected" buttons. To the right, a "Page divider" shows "Page: 1" and "2". The results table has columns: Actions, T, File Name, Created Date, Created By ID, File Size, Description, Folder Path, and CaseNumber (Case). The first row shows "genre-classics.jpg" with a file size of 68.14 KB. A dropdown menu for "Item Actions" is open, showing options: Download, Open, Copy URL, Edit, Delete, and Previous Versions. At the bottom, there are "Email Selected" and "Delete Selected" buttons.

Actions	T	File Name	Created Date	Created By ID	File Size	Description	Folder Path	CaseNumber (Case)
<input type="checkbox"/> Item Actions		genre-classics.jpg	24/05/2016 08:46	SDrive Test	68.14 KB	Image Description	Home/123	00001000
<input type="checkbox"/> Item Actions		genre-classicT.jpg	24/05/2016 08:46	SDrive Test	54.82 KB		<a href="#">Click to View Folder Path</a>	00001000
<input type="checkbox"/> Item Actions		genre-comedy.jpg	24/05/2016 08:46	SDrive Test	81.89 KB		<a href="#">Click to View Folder Path</a>	00001000
<input type="checkbox"/> Item Actions		genre-country.jpg	24/05/2016 08:46	SDrive Test	94.52 KB	Sample Description	Home/123	00001000
<input type="checkbox"/> Item Actions		genre-health.jpg	24/05/2016 08:48	SDrive Test	107.78 KB		Home/123/456/788/555	00001000
<input type="checkbox"/> Item Actions		genre-soundtrack.jpg	24/05/2016 11:17	SDrive Test	47.18 KB		<a href="#">Click to View Folder Path</a>	00001001
<input type="checkbox"/> Item Actions		genre-sports.jpg	24/05/2016 11:17	SDrive Test	100.32 KB		<a href="#">Click to View Folder Path</a>	00001001
<input type="checkbox"/> Item Actions		genre-teens.jpg	24/05/2016 11:18	SDrive Test	59.01 KB		<a href="#">Click to View Folder Path</a>	00001001
<input type="checkbox"/> Item Actions		genre-thriller.jpg	24/05/2016 11:18	SDrive Test	63.64 KB		<a href="#">Click to View Folder Path</a>	00001001
<input type="checkbox"/> Item Actions		genre-vocal.jpg	24/05/2016 11:18	SDrive Test	139.88 KB		Home	00001001

Figure 151

#### Item Actions

## 1- Downloading Files

You can download a file by clicking "**Download**" item menu action under the "Item Actions" button (Figure 152).

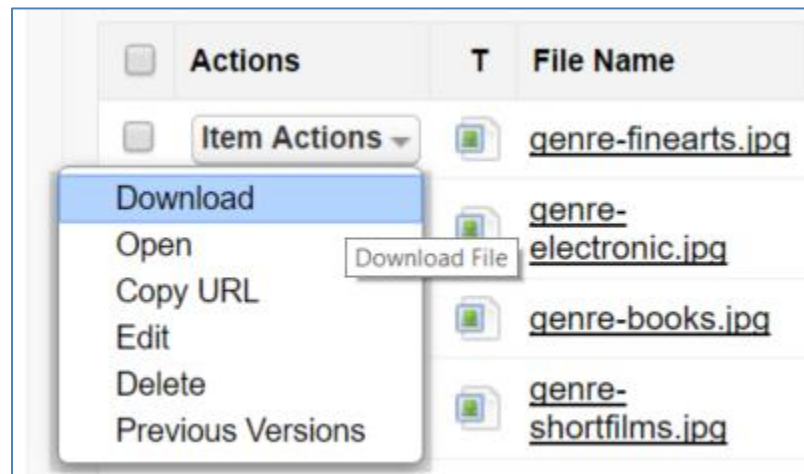


Figure 152

## 2- Opening Files

You can open a file by clicking "**Open**" item menu action under the "Item Actions" button (Figure 153).

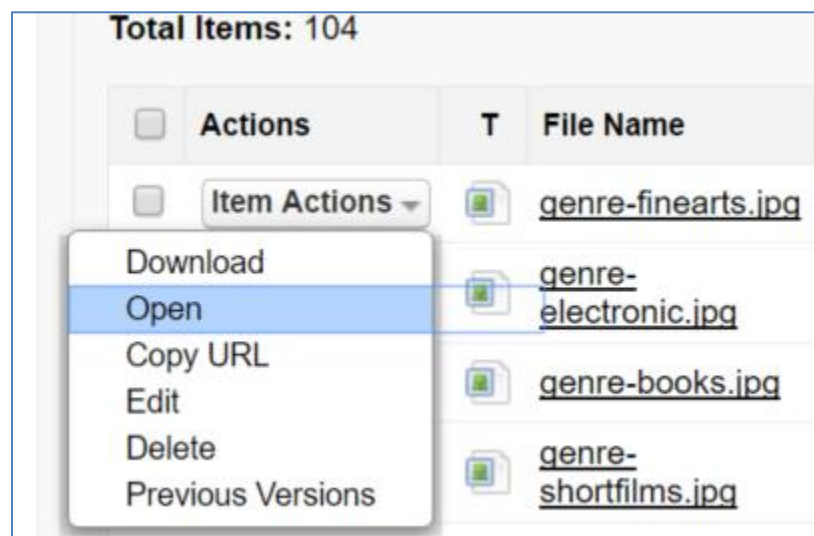


Figure 153

### 3- Copy URL

You can Copy URL of a file by clicking "**Copy URL**" item menu action under the "Item Actions" button (Figure 154). After clicking Copy URL, you can select full URL and copy it (Figure 155).

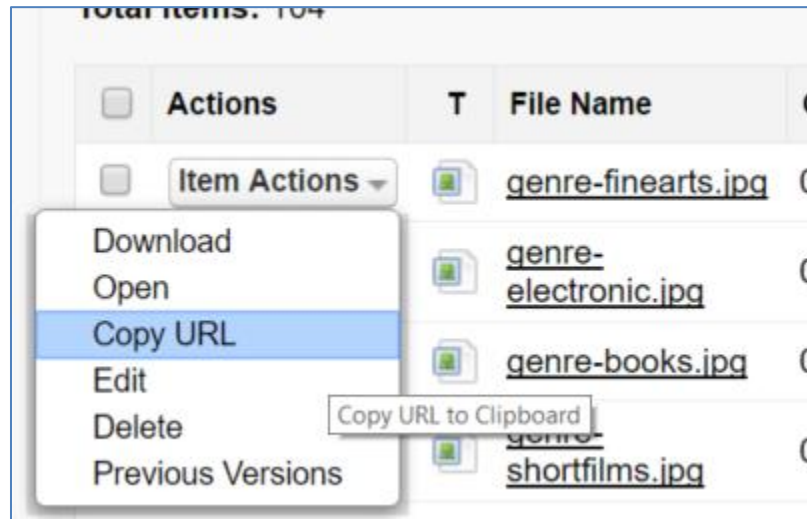


Figure 154

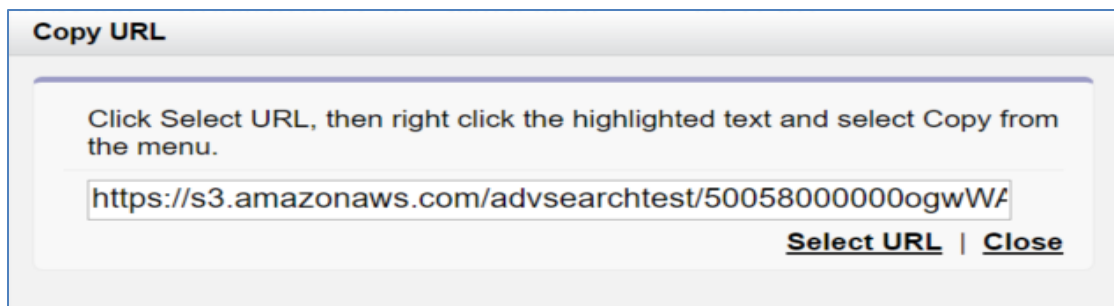


Figure 155

### 4- Editing Files

You can edit a file by clicking "**Edit**" item menu action under the "Item Actions" button (Figure 156). After clicking Edit, you can edit Description of file and save it. (Figure 157).

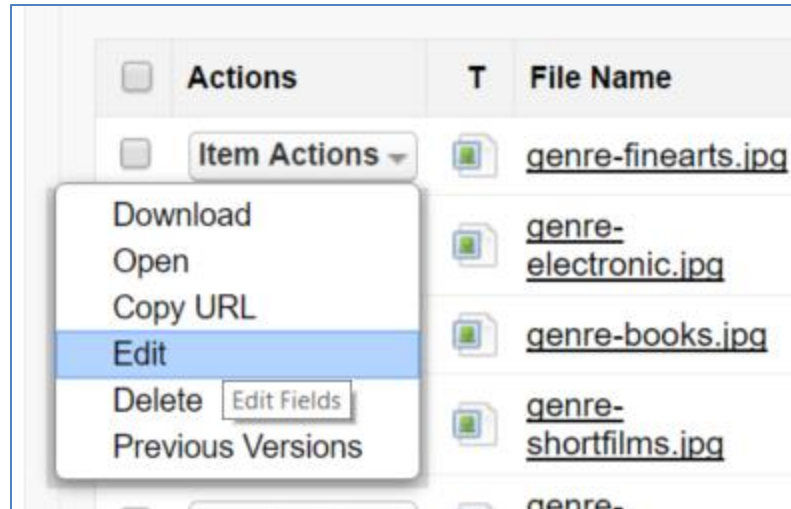


Figure 156

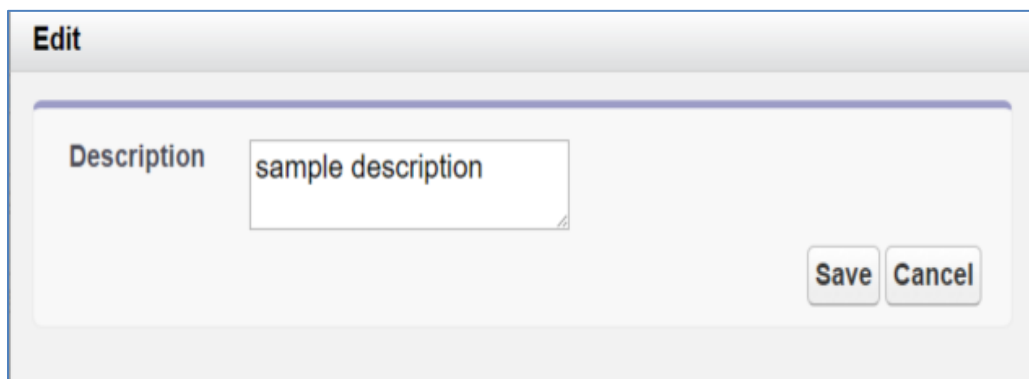


Figure 157



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 158).

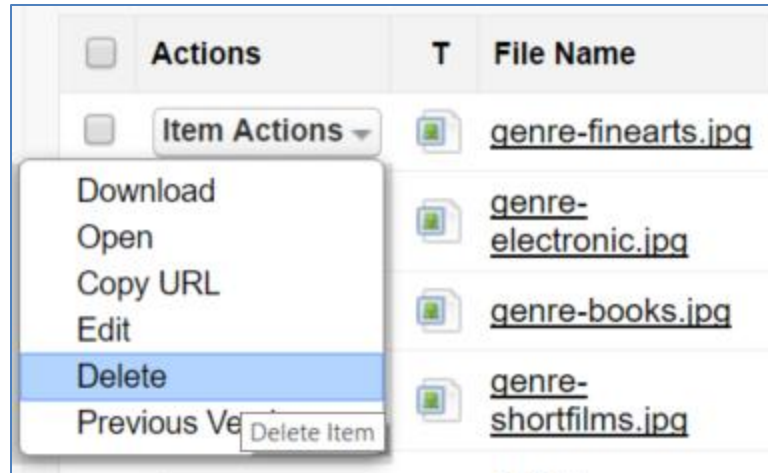


Figure 158



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 159). After clicking on it, version history of the file will be listed (Figure 160).

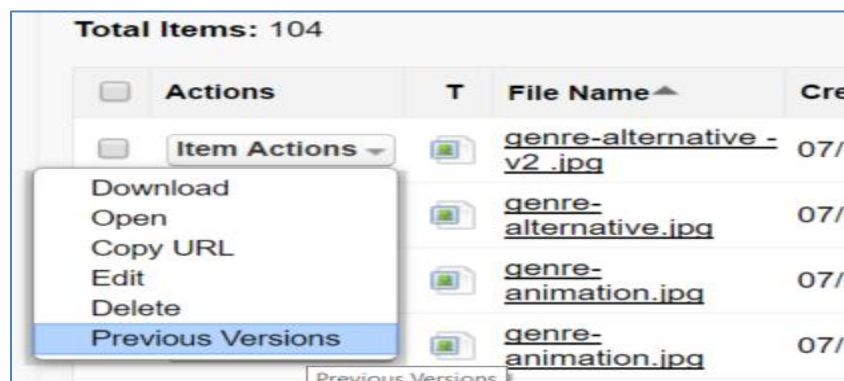




Figure 159

Results

Email SelectedDelete Selected

Total Items: 2

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

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

Download

Open

Copy URL

Edit

Delete

Email SelectedDelete Selected

Figure 160

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



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 161).

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 161).

Results

Email SelectedDelete Selected

Total Items: 103Page: 12







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

Figure 161

## 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 162). “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		<a href="#">Click to View Folder Path</a>	00001000

Figure 162

## 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 163);

Search

Search is successful.

Results

Email Selected Delete Selected

Total Items: 16

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

Figure 163

## W.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 fileId,
    Long timeValue)
```

#### Parameters:

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

**fileId:** 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 164)

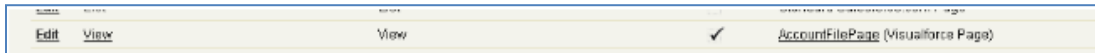


Figure 164

2. Upload a jpg image file into one of your accounts using Upload File(s) button. (Figure 165)

Account Files						
<input type="button" value="Upload File(s)"/> <input type="button" value="Email Selected"/> <input type="button" value="Delete Selected"/>						
<input type="checkbox"/>	Actions	File Name	File Size	Created By	Created Date	Description
<input type="checkbox"/>	Download   Copy URL   Edit   Del	a23_17807277.jpg	283.88 KB	CyanGate CyanGate	7/26/2010 7:08 AM	Image

Figure 165

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 166)

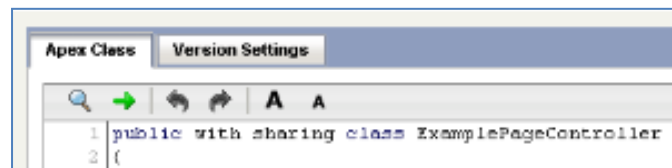


Figure 166

```
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 167)



Figure 167

```

<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 168)

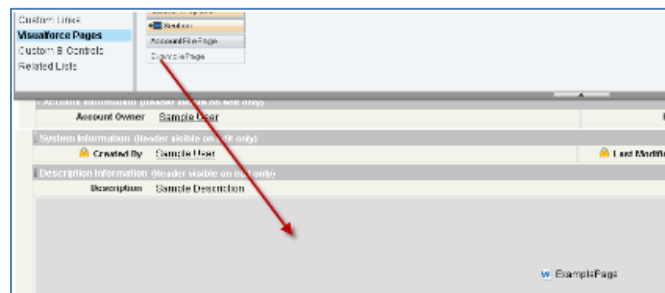


Figure 168

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 169)



Figure 169



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



1. If you would like to get an old version of a file, you should add id of an old version file into `fileObjectIds` 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 171) 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);
```



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

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

**Return Value:** The method will return the list of UploadRequestInfo (Figure 170), which holds information about the files that are about to be uploaded.

The following steps are executed within this method:

- 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.
- 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.
- 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 172 and Returns a list of UploadRequestInfo (Figure 170) 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 173.

#### 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 locations. 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 170

#### *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 171

#### 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 172

### 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 SObject.  
**[Solution]** Give the parent folder ids the same for all SObjects.
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 SObjects. The same file name condition holds when the file is not a WIP (WIP\_\_c =false) file or the file is a WIP file (WIP\_\_c =true) with the same file name but it has been uploaded by another user less than 12 hours ago.  
**[Solution]** Upload files with different file names or delete the previously existing files before the upload.
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 space or a dot and contains any of the following characters: \/: \*? \ "<> / ~  
**[Solution]** Do not upload a file with the name starting with space or a dot and contain any of the following characters: \/: \*? \ "<> / ~
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-character Salesforce.com ID as objectId parameter.

### b) Error Messages of ResultObject and Reasons

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

Html upload example:

```
<form>
File : <input type="file" name="file" id="file" />
      <input type="button" value="Upload" onclick="htmlUpload();" />
</form>
```

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

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



```
function handleFileSelect(evt)
{
    var fileName = evt.currentTarget.files[0].name ;
    var fileSize = evt.currentTarget.files[0].size;
    uploadFile = evt.currentTarget.files[0];
    //Call initializeUpload() method
}

function htmlUpload()
{
    var fd = new FormData();
    fd.append('key', '{!uploadRequestInfos.fileLocation}');
    fd.append('AWSAccessKeyId', '{!accessKey}');
    fd.append('acl', 'private');
    fd.append('policy', '{!uploadRequestInfos.policy}');
    fd.append('signature', '{!uploadRequestInfos.signature}');
    fd.append('x-amz-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 173).

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

Figure 173

#### 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.



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

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

**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.



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 fileObjectIds list.

#### u. getThumbnailURL()

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

```
String getThumbnailURL(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.



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 fileObjectIds 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 file.

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



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 fileObjectIds list.

## X. 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](https://sdriveapp.com/support)
2. Email: [sdrive@sdriveapp.com](mailto:sdrive@sdriveapp.com)

You can find up-to-date product information, documents, tutorial videos, tools in our web page:  
[www.sdriveapp.com](https://www.sdriveapp.com)