# S-Drive
# User Guide
# v2.7

***Important Note***

This user guide contains detailed information about S-Drive usage in Salesforce Classic and Salesforce Lightning Experience. Refer to the *S-Drive Admin Guide and S-Drive Developer Guide* for more information about installation, configuration and customization of S-Drive product.

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**Contents**

# I.    USER GUIDE FOR SALESFORCE CLASSIC

This section includes information about how to use S-Drive in Salesforce Classic view.

## 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:
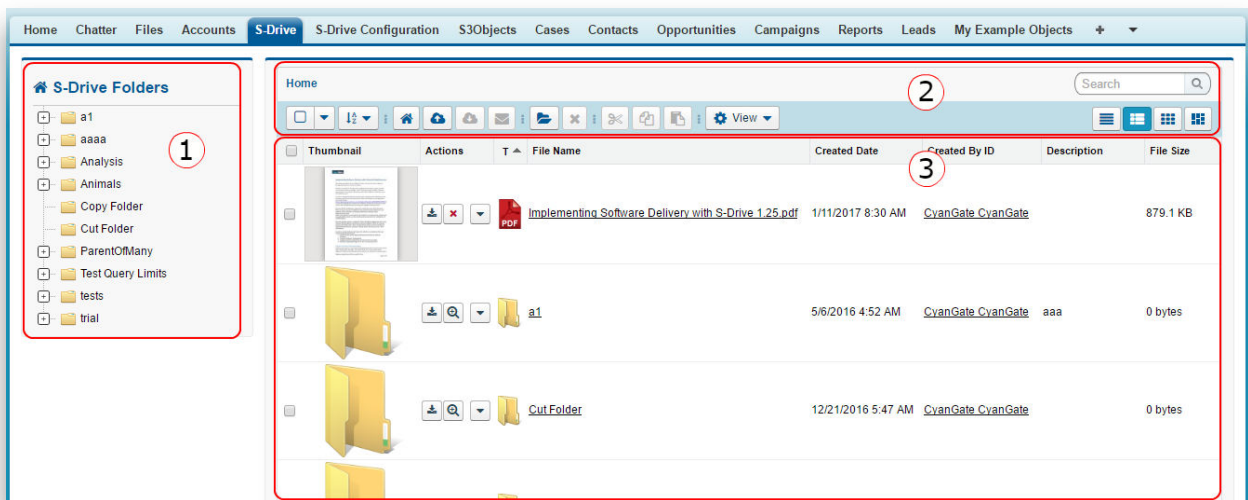


Figure I-1

### 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

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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*).*
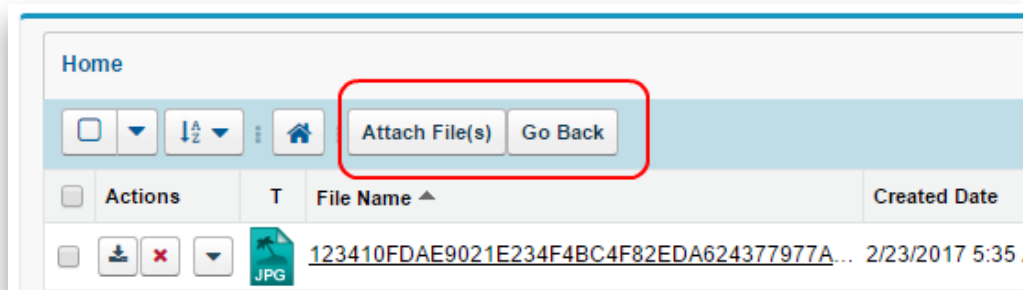


**Figure I-2**
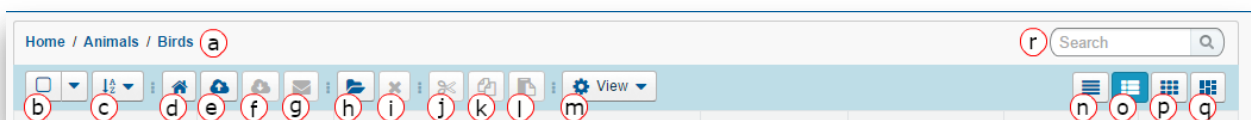


**Figure I-3**

(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.

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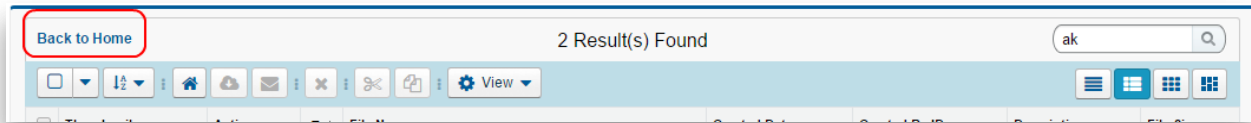
Figure I-4

(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 view type in default.

*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.*

      **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

- **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)

Figure I-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.
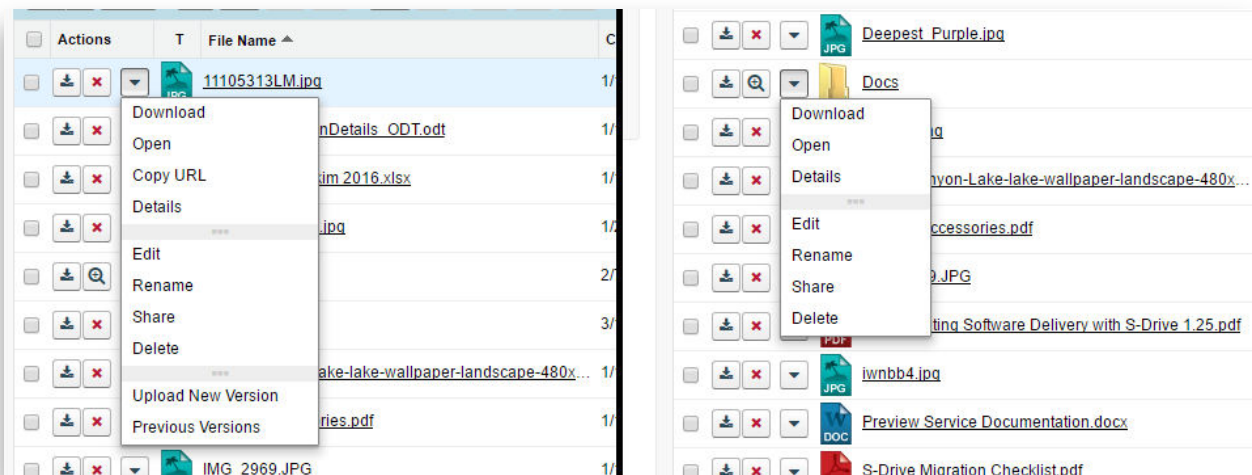


Figure I-6

(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).

- **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.
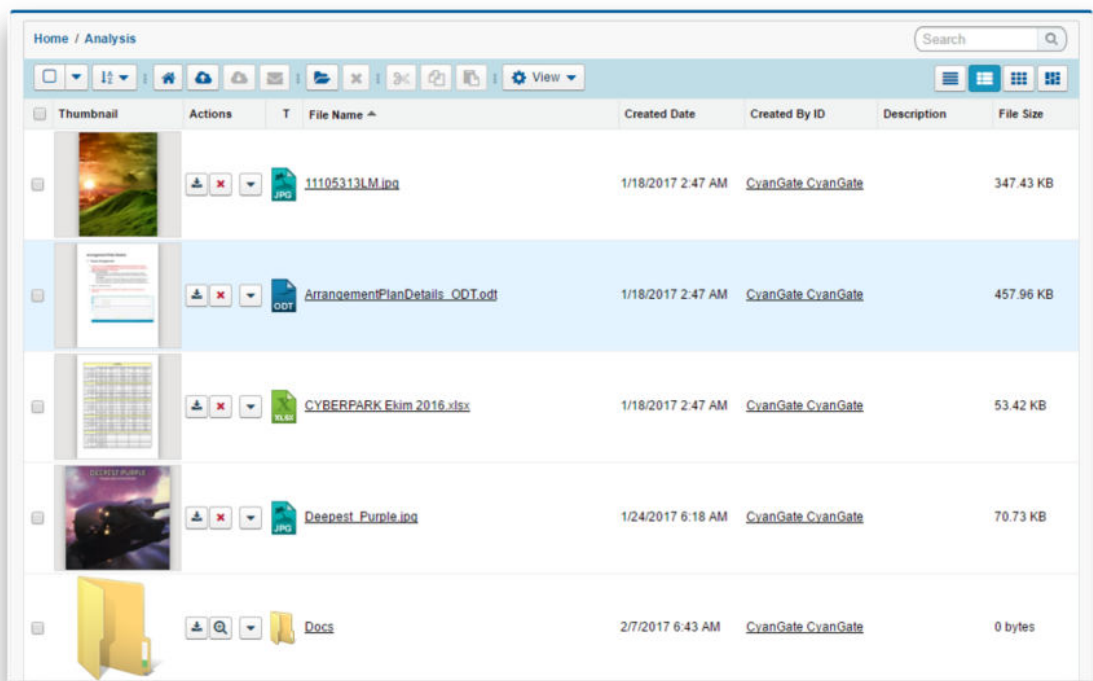


**Figure I-7**

- **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 I-8

1) **Selection Checkbox:** When mouse hovers over a card, a checkbox is shown on the top-left side. You can select or deselect an 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.
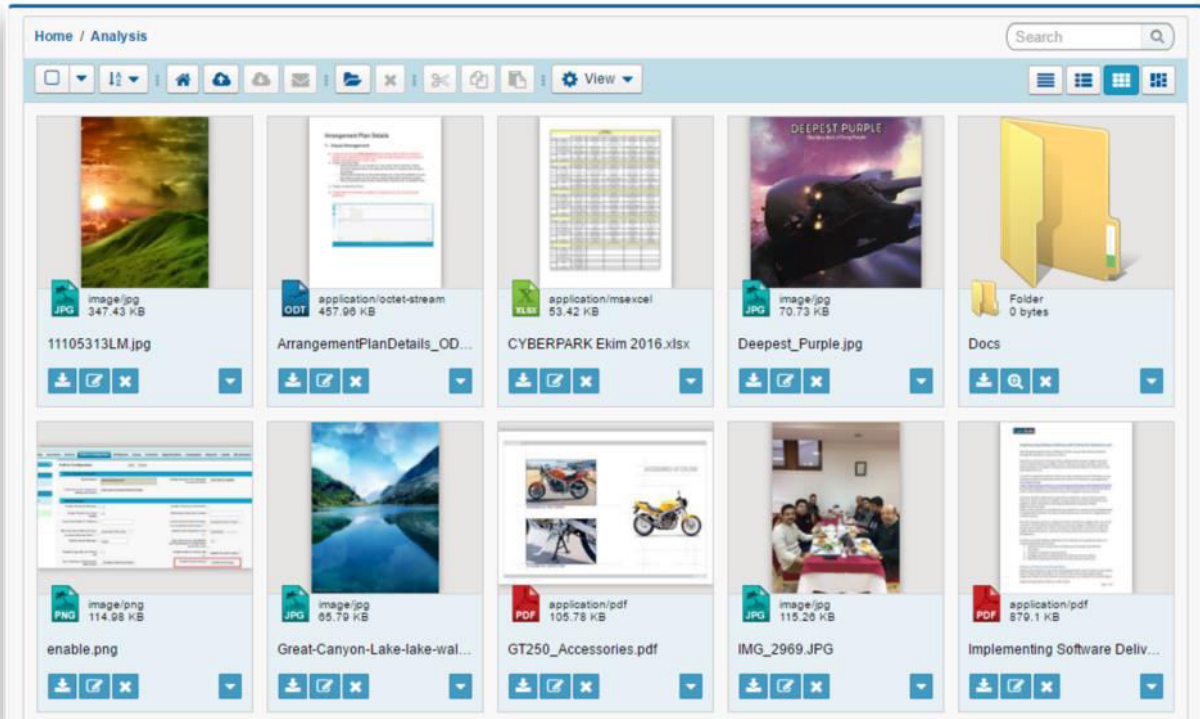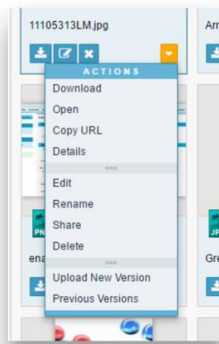
Figure I-9



Figure I-10

- **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).

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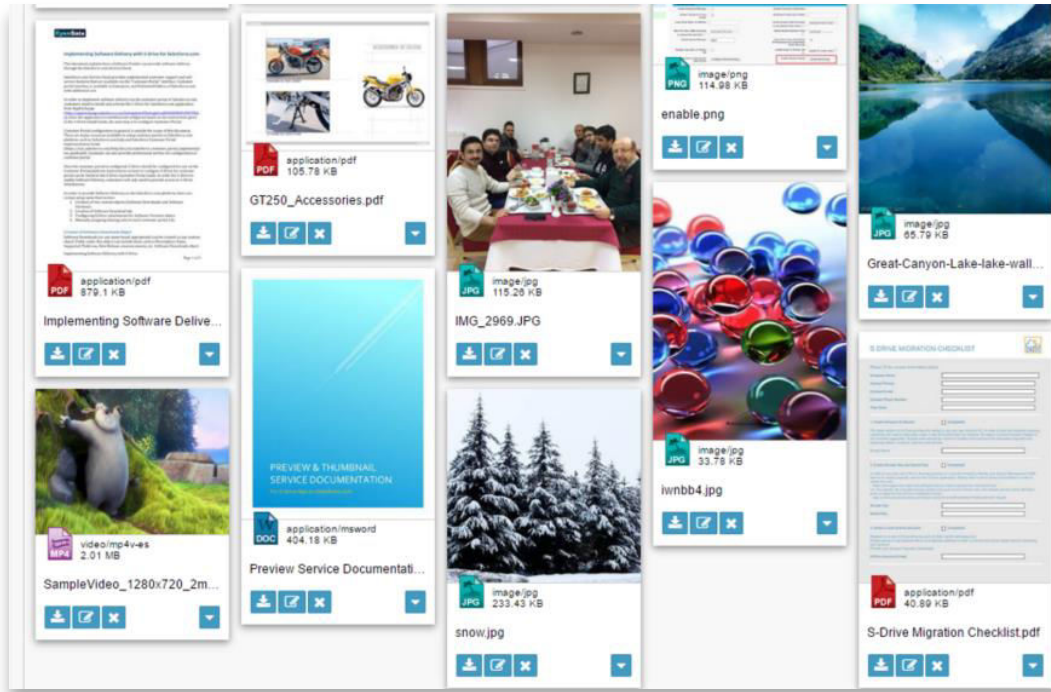
Figure I-11

**Note: 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 detailed information on actions menu please check **List View \ Actions** section.
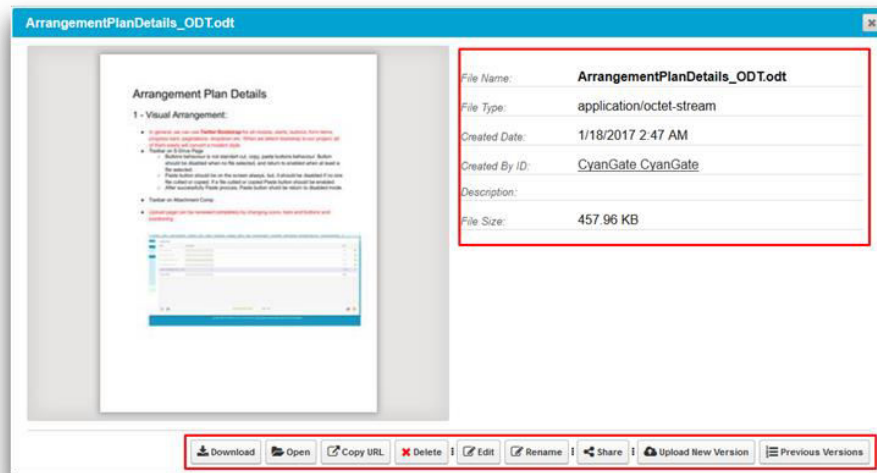
Figure I-12

## 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):
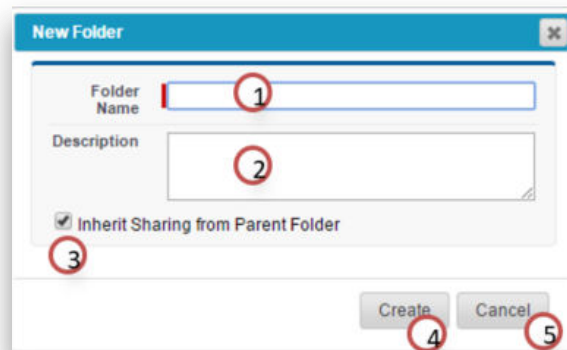


Figure I-13

(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).

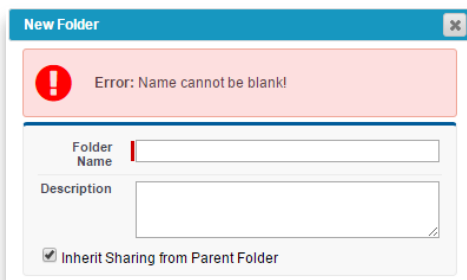**(5) "Cancel Button"**: If you decide not to create a folder, you can click Cancel button. Operation will be cancelled, and you'll return back to the S-Drive Folders screen (Figure 13-5).

*Notes*



1.     If you try to create a folder without a name, with forbidden characters, or with a name that exists in the current folder you'll get one of the warning messages below:
   - *'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.
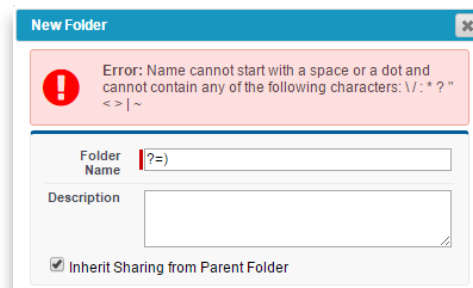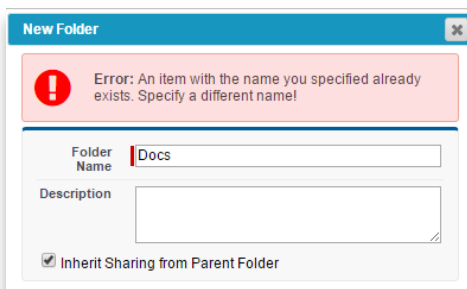
2. "**Create Folder**" button becomes invisible if you do not have permissions to create a folder.

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

- **Uploading with Buttons**

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.
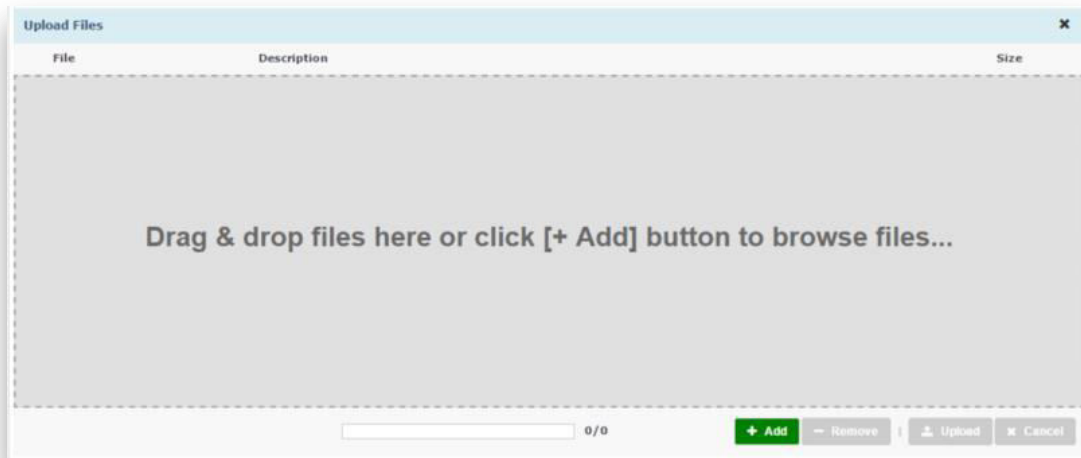
**Figure I-14**

(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).
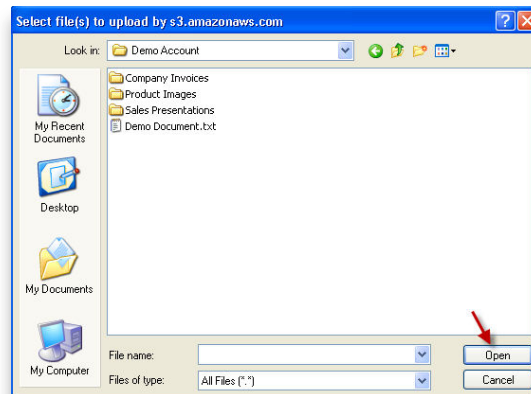


**Figure I-15**

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".
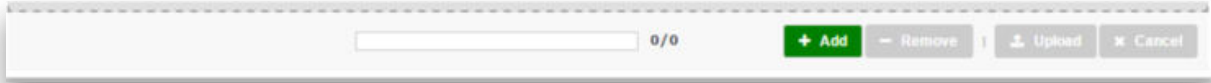
**Figure I-16**

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 I-17**

![Notes icon] *Notes*

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

(1) **"Status Column"**: This column displays the status of the files which are being uploaded. For HTML Upload, there are five possible scenarios: *Queued*, *Uploading*, *Multipart Processing*, *Done* and *Failed* (Figure 18).



| | | |
|---|---|---|
| ⊖ Screenshot_4.png | | 16 kb |
| ⊗ sdrive_page1.png | | 95 kb |
| ✓ Screenshot_3.png | Sample page upload panel | 13 kb |
| ⚠ Relaxing Music Mix - BEAUTIFUL P... | | 350.1 mb |
| ◌ SalesforceForOutlook.exe | | 28.8 mb |

**Figure I-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.

![Notes icon] *Notes*

1. If you try to upload a file with a name that exists in that folder, you'll get a warning message saying, "Do you want to overwrite the file?" There are 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.
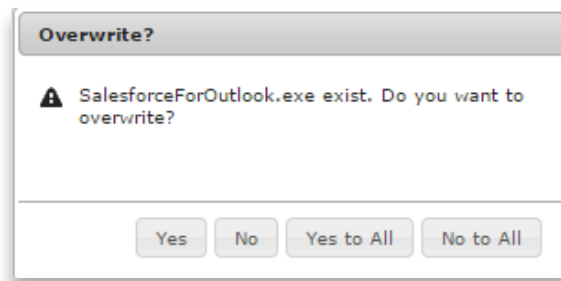


**Figure I-19**

   - 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.
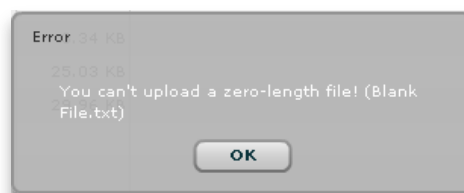


**Figure I-20**

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.
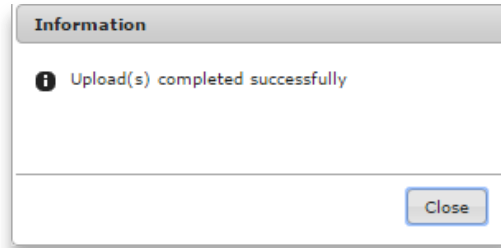
4. "**Upload File(s)**" button becomes invisible if you do not have permissions to upload file(s).

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).

- **Uploading with Drag and Drop**

You can also upload files with by dragging and dropping from the desktop or your file explorer to S-Drive on your browser. Select and drag your files from your local interface and drag it to anywhere on the S-Drive component. The component will turn blue, and you can drop the file.
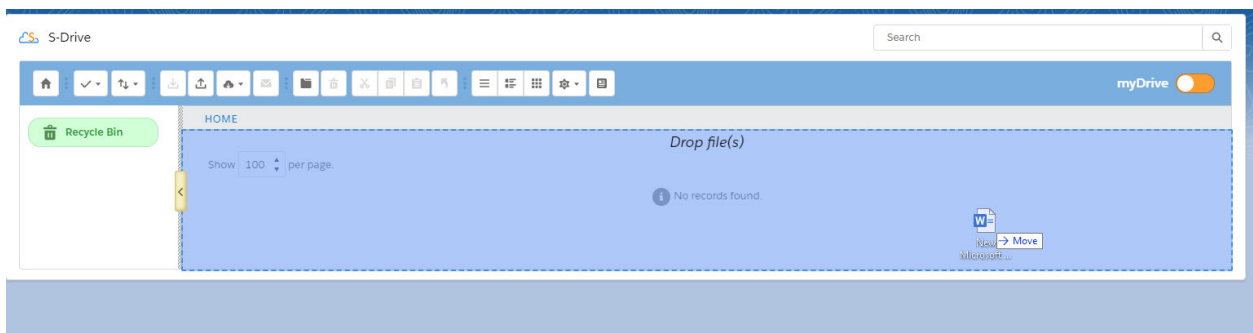


Once you drop the file or files, the Upload panel will open as shown below.  If the File Object has a required field, you will have to fill them in. Then click the upload button. Once uploaded, click on continue to finish.

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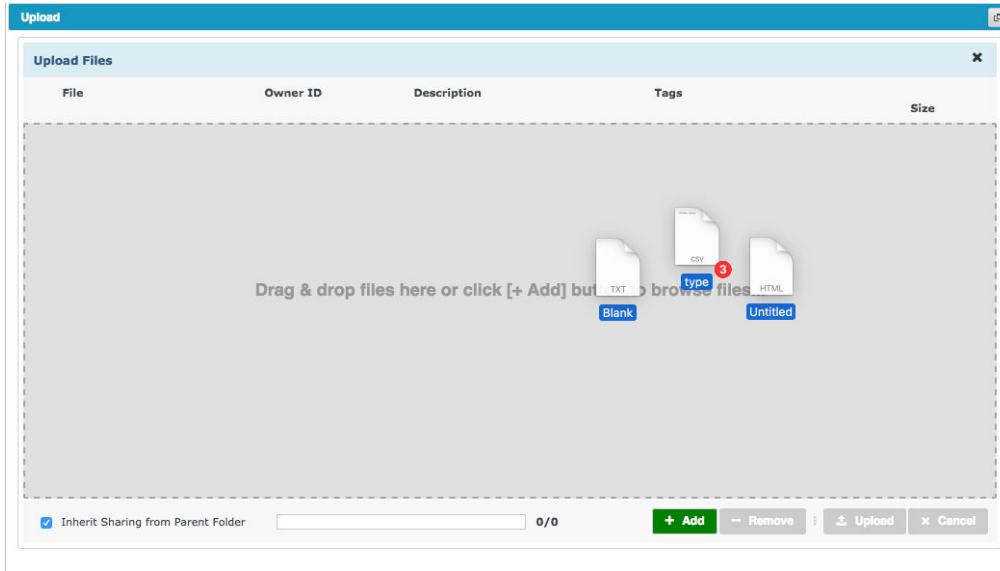
## E.      Tagging

Tagging is a new feature in the 2.5 release and is available for Salesforce Classic and Lightning Experience. You can both add tags to your S-Drive files and delete the existing tags. Tags are also searchable. By clicking on the tags, you can find files that have the same tags with the clicked one.

If you don't see Tags, refer to **Admin Guide 2.5 – 3.2.1. S-Drive Configuration Tab Section H** to learn how to configure it.

- **Adding Tags**

In order to add tags to a file, go to *Details* of the file.
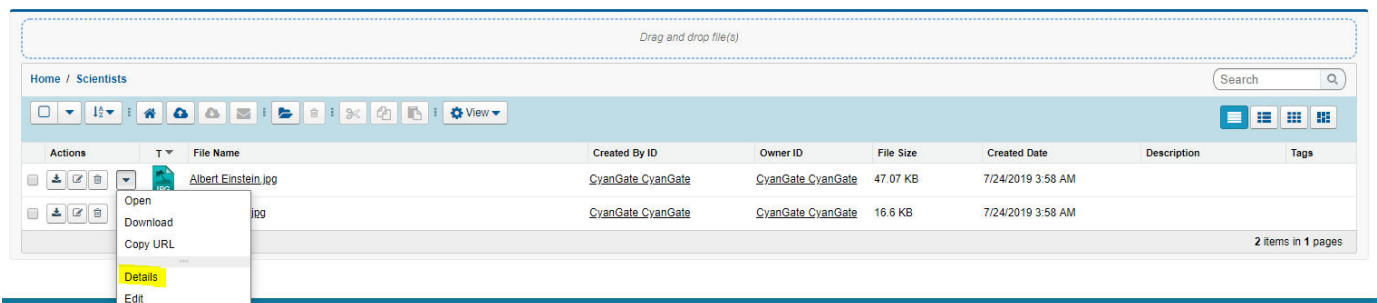


*Figure I-23*

From *Details* section, click *Edit*.
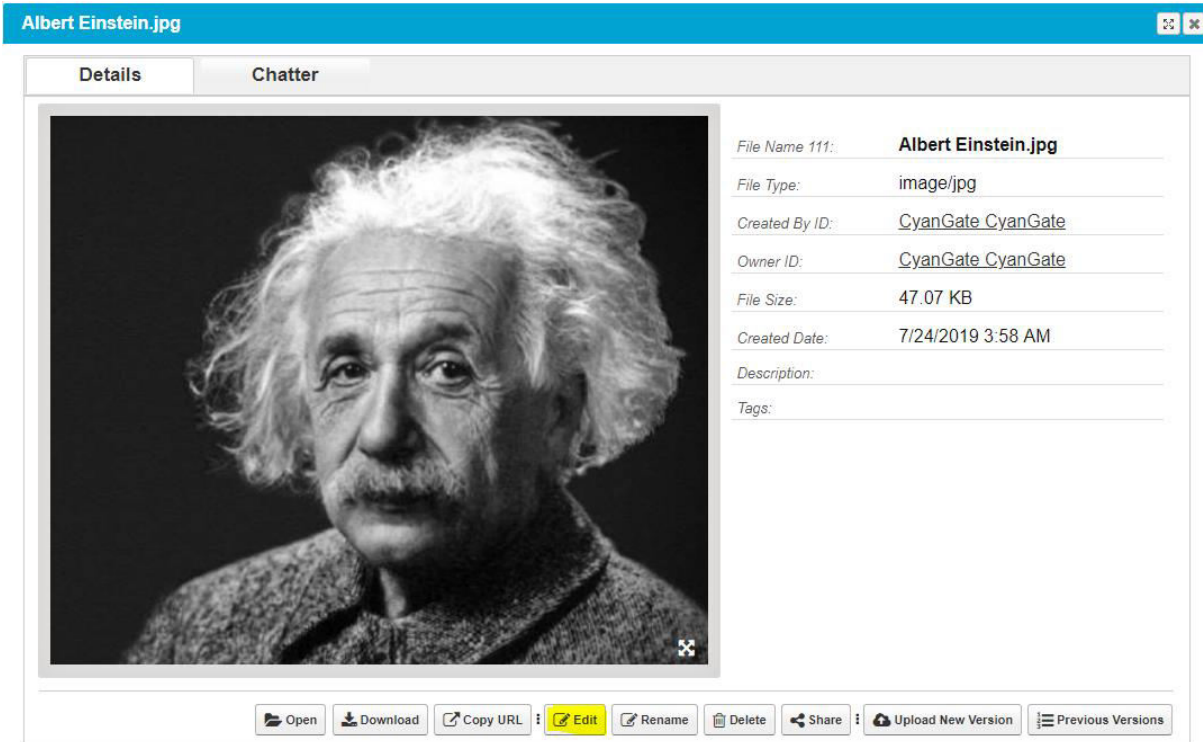
Figure I-24

Then you will see the edit panel. You can either add a single tag or add multiple tags by separating them with a comma. After adding the tags, press *Enter* to save them.
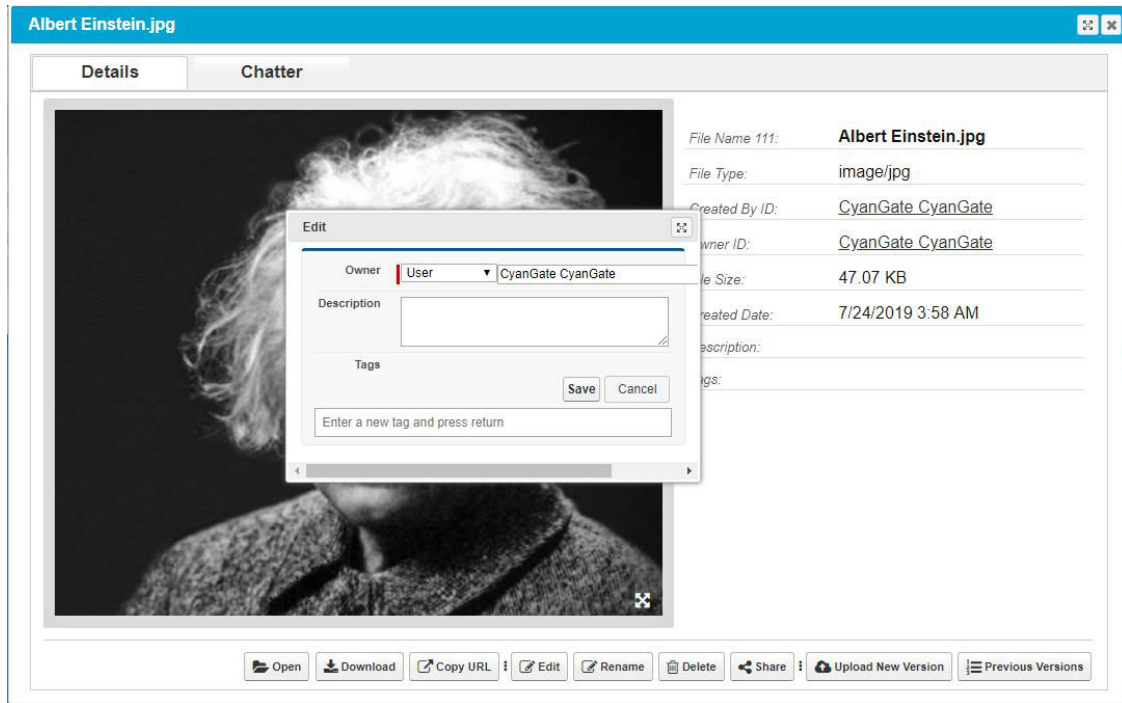
**Figure I-25**

Here you can write the tags that you desire for the file.
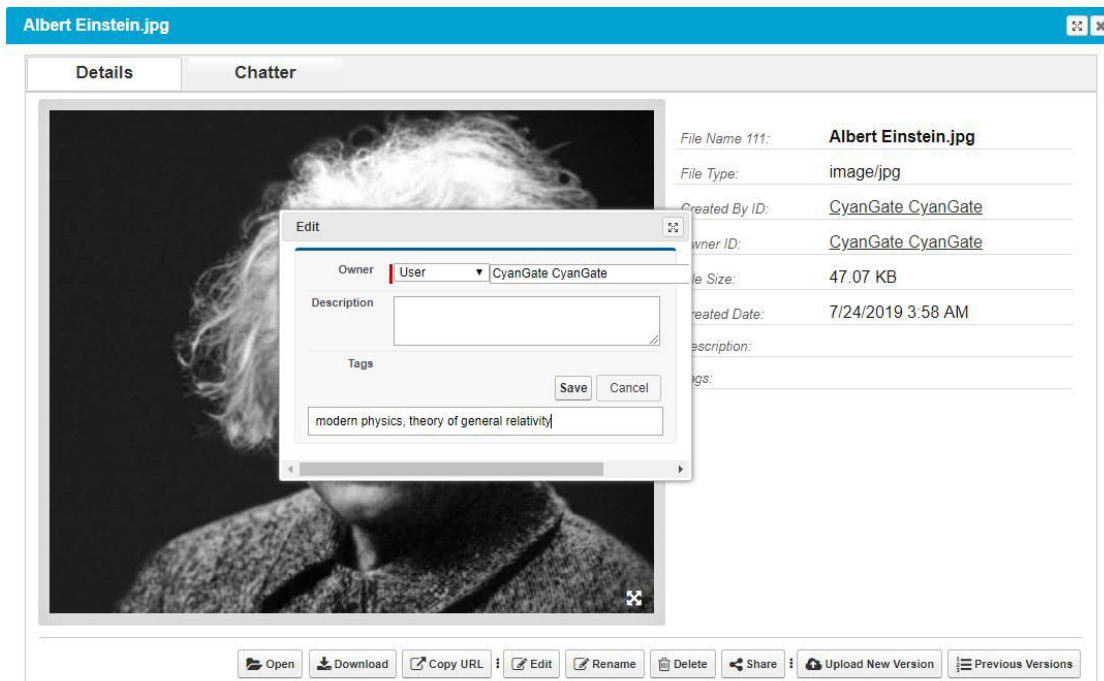


**Figure I-26**

After entering the two tags and clicking the enter button, tags will be saved.
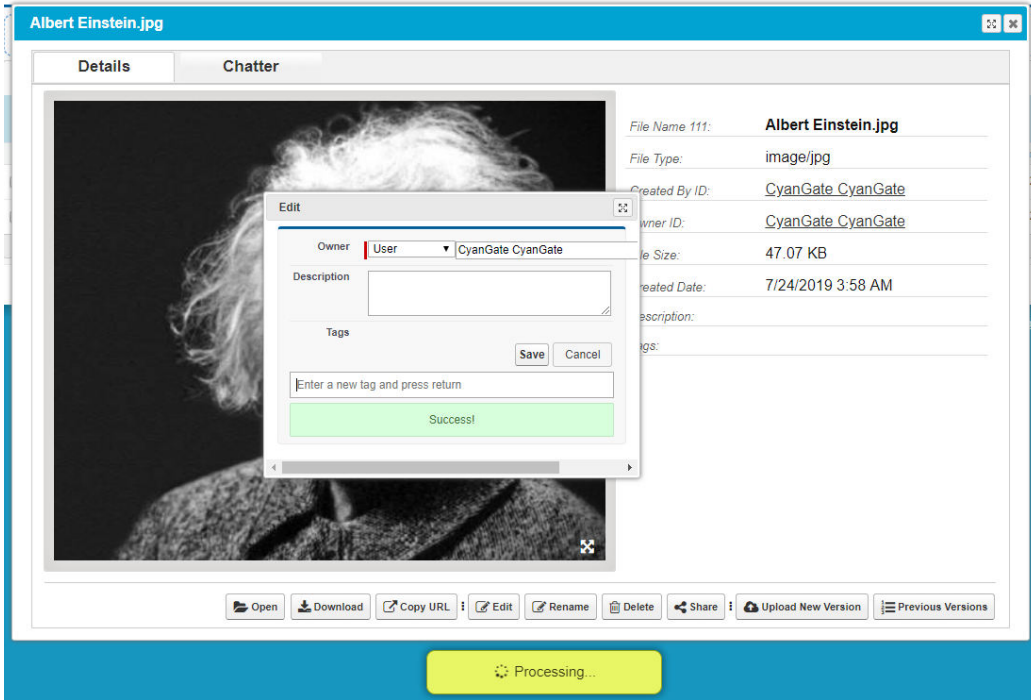
**Figure I-27**

After saving, you can see the tags in the details of the file.
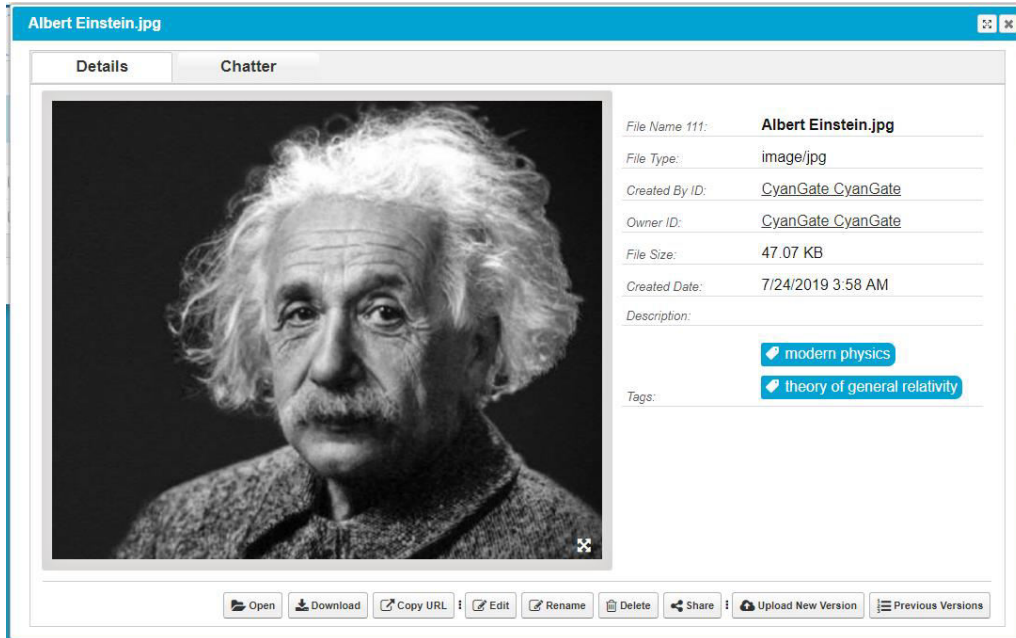


**Figure I-28**

- **Removing Tags**

If you want to delete the tags from the files, go to *Details/Edit* section again.
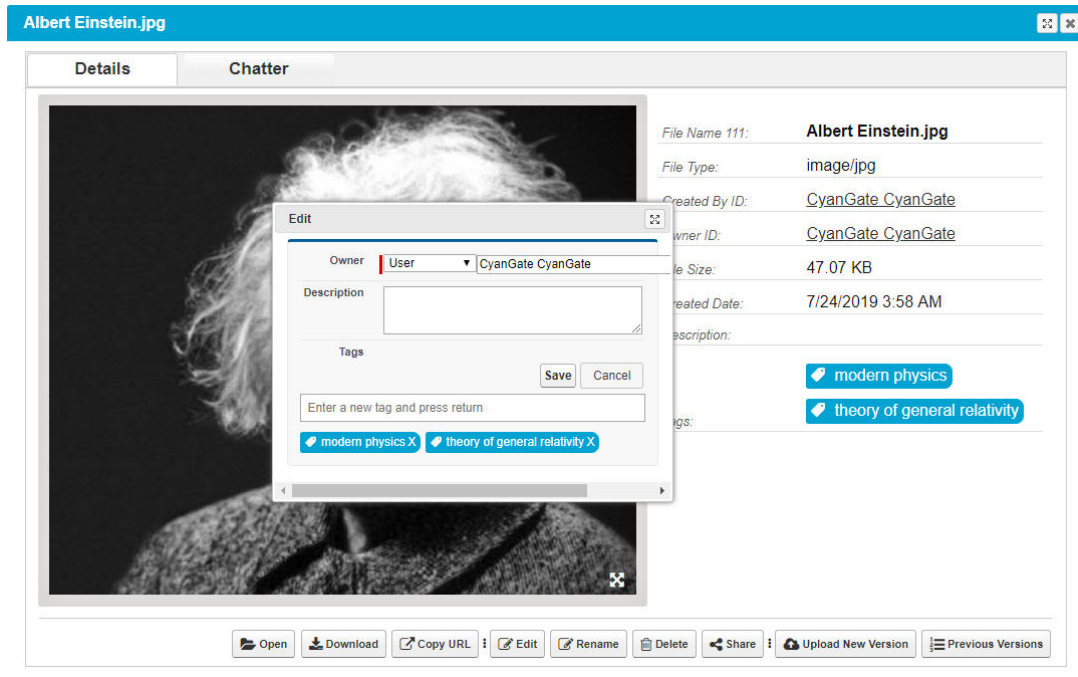


**Figure I-29**

Click X button, and click Save.
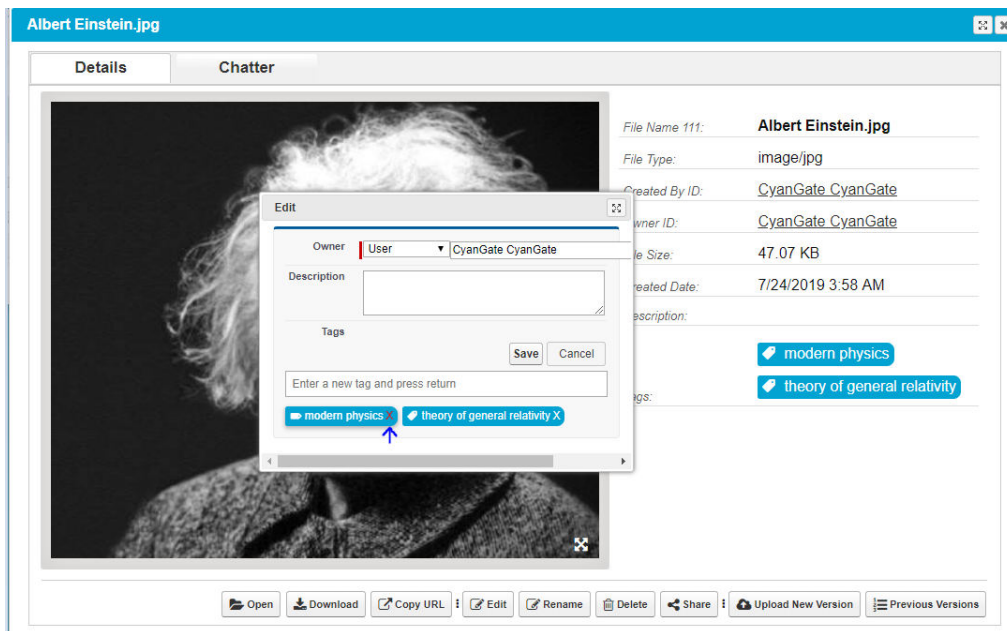


**Figure I-30**
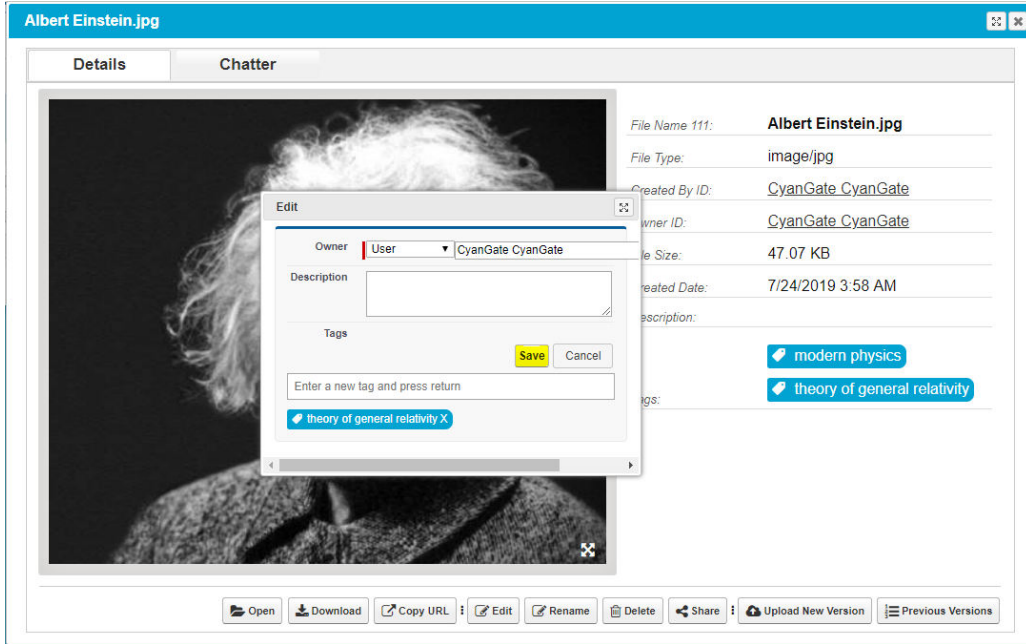
Figure I-31

Then the related tag will be deleted.



Figure I-32

All Rights Reserved - CyanGate LLC
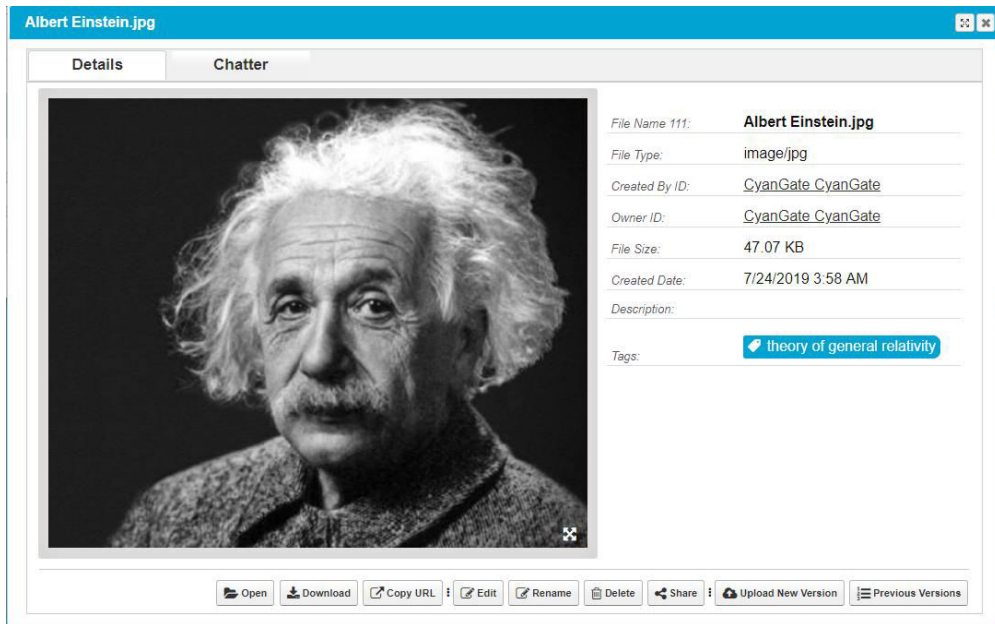
- **Searching Files with Tags**

You can search and find files across S-Drive that have the same tags with the clicked one. In order to search, click the tag in the detail section of the file.
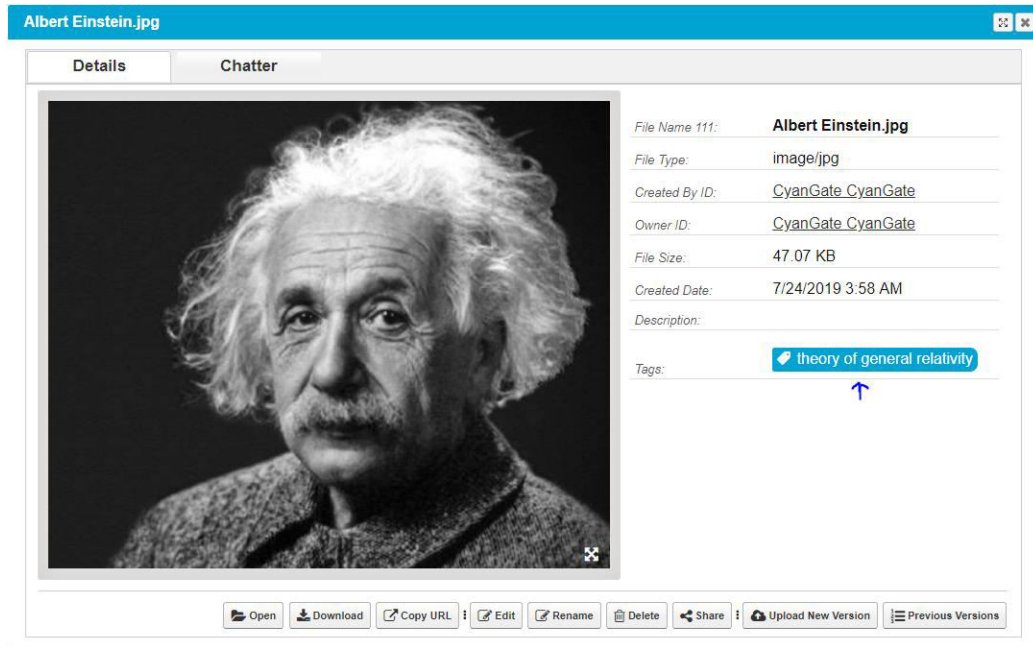


**Figure I-33**

You can see the result as below. Right now, there is only one file that has the *theory of general relativity* tag.
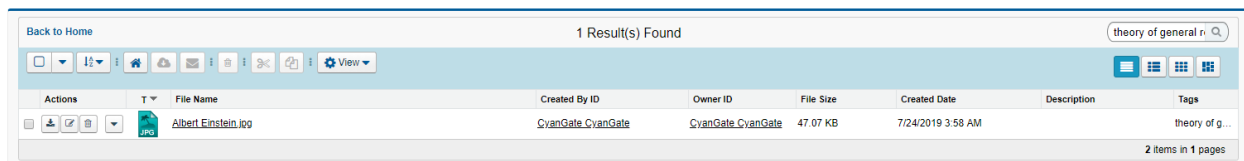


**Figure I-34**

## F.  Deleting Files and Folders

To delete a single file or folder, click the trash can icon next to the desired file/folder (red square) or click the down-arrow to see the action menu and choose the Delete action (blue squares).

To delete multiple files or folders, check the box next to the items to be deleted and click the "Delete" button on the toolbar (orange squares).
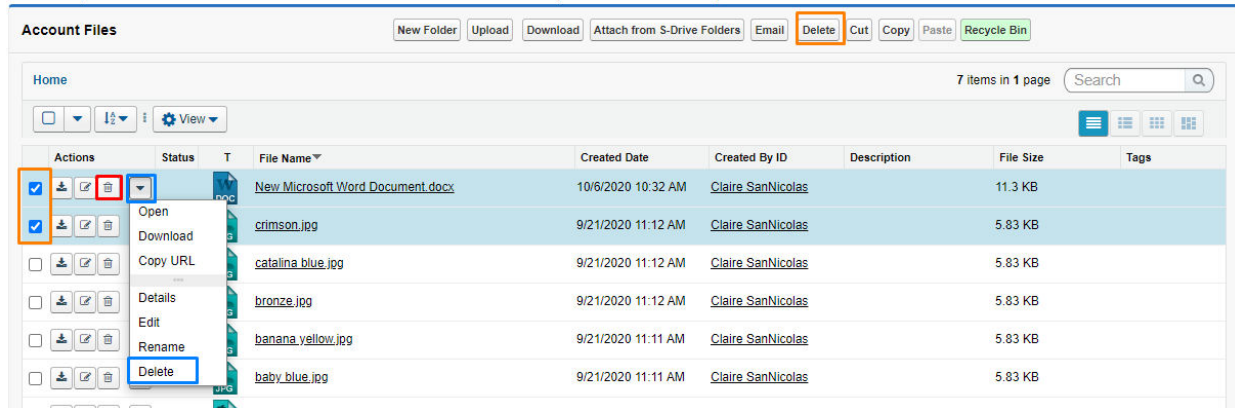


When you delete a Folder, all files and subfolders will also be deleted.

The files or folders deleted will immediately go to the **Recycle Bin**.

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can restore them, or delete them permanently.

*Notes*

1.  If versioning is enabled and selected file has versions, **all versions of selected file will also be deleted.**
2.  Unlike the Salesforce Recycle Bin, **S-Drive Recycle Bins are not automatically emptied**.
3.  When a folder is deleted, all files and subfolders are also deleted.
4.  If **a file having shortcuts** is deleted from S-Drive, shortcuts of that file will be deleted in most cases. Shortcuts on file objects that are not searchable will not be deleted.  (Note that the shortcut deletions might not happen immediately. Contact your admin to learn the exact time your shortcuts will be deleted or refer to S-Drive Admin Guide to set the time.)

### 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 will just click the link in the email, and they will download attachments directly from source secure and fast. You can use email templates in your organization. Let's see how this can be done (Figure 43). 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).
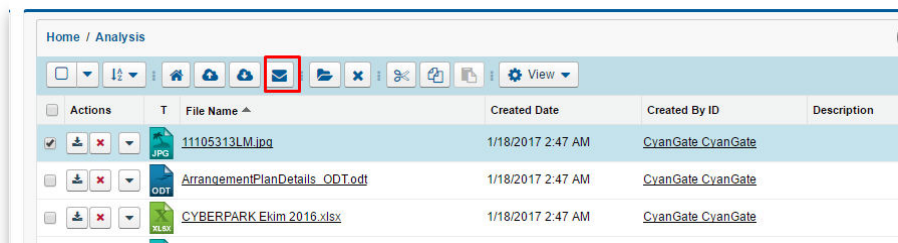


**Figure I-43**

Email Files screen contains many features (Figure 44). Let's review the details of the fields in this screen:
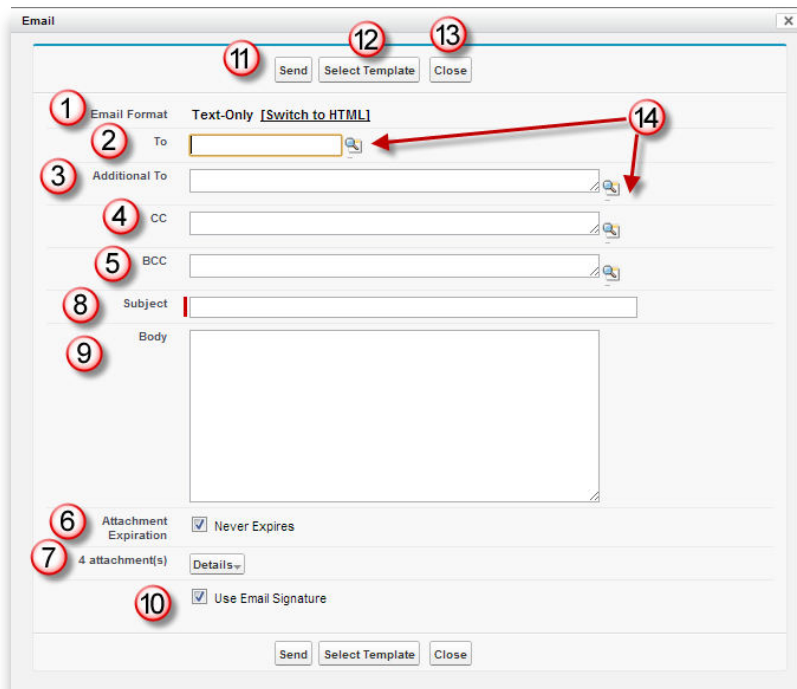


**Figure I-44**

(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 44-1).

(2) **"To...":** The main recipient of the email (Figure 44-2). 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 44-14) 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 45). 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 Admin Guide* for enabling Activity History for standard and custom objects.
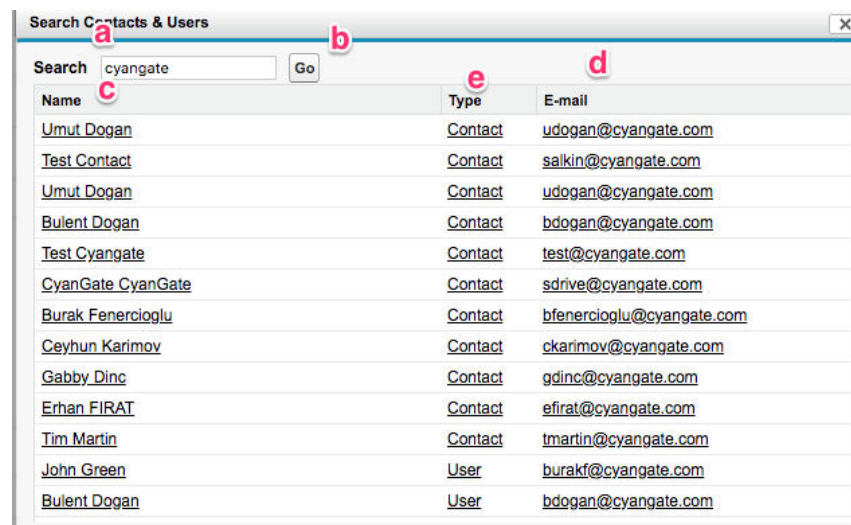


**Figure I-45**

***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 Admin 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 45-a).

(b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 45-b).

(c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 45-c).

(d) **"Email Column"**: Results' emails will be displayed in this column (Figure 45-d).

(e) **"Type Column"**: Results' type (contact or user) will be displayed in this column (Figure 45-e).

(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 44-14) to select recipients from Salesforce contacts (Figure 44-3). "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 44-14) to select recipients from Salesforce contacts (Figure 44-4). "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 44-14) to select recipients from Salesforce contacts (Figure 44-5). "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 44-6). 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 46). 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.
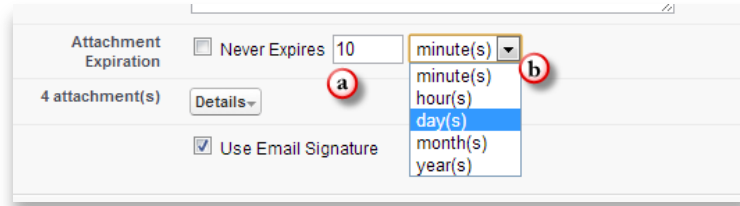
Figure I-46

(a) **"Number Field"**: Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 46-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 46-b).

(7) **"Attachment Details"**: This section gives information about attached files (Figure 44-7). 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 47).
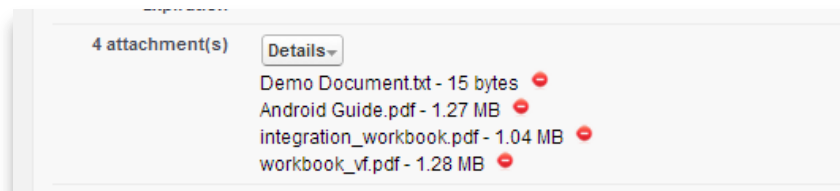


Figure I-47

(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 44-8).

(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 44-9).

(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 44-10). "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 44-11). 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 48).
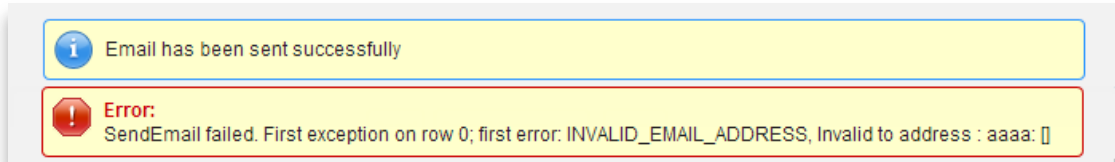
**(12)** **"Select Template":** You can click "Select Template" button to choose a predefined email template. Choose a folder and select a template from the folder. If necessary, you can modify the content of the template in your email; however, you cannot modify Custom templates (Figure 49). Once you 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.
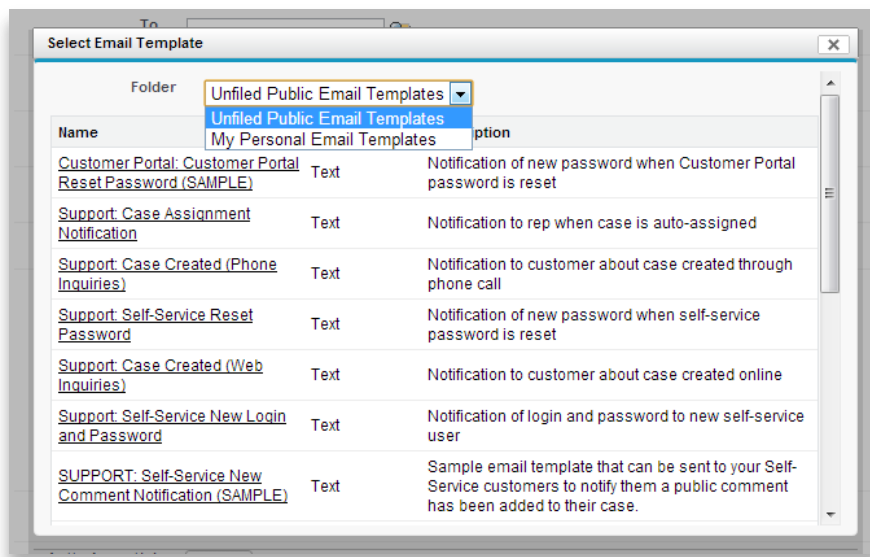
**(13)** **"Close"**: You can close email screen by clicking this button. It will close the email screen and return you back to the S-Drive screen (Figure 44-13).

*Notes*

1. You cannot email folders. If you try to email a folder as an attachment, you'll get "You can't email a folder. Please check your selection list and try again!" message (Figure 50).
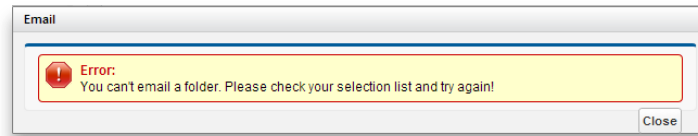


Figure I-50

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 Admin 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 51).
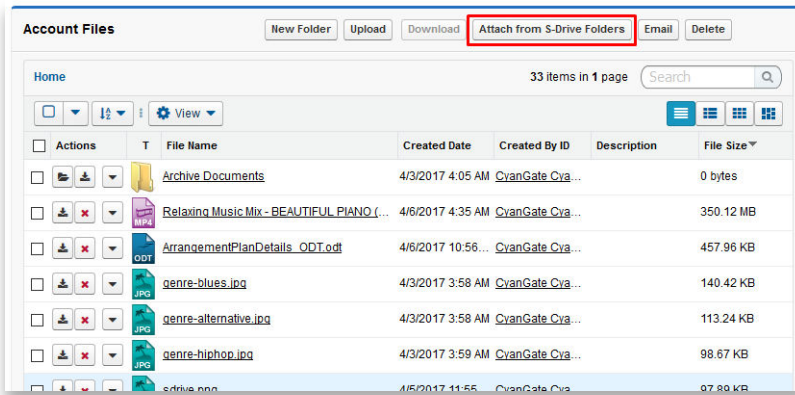


Figure I-51
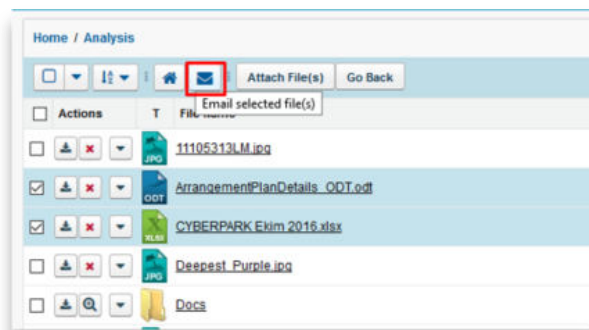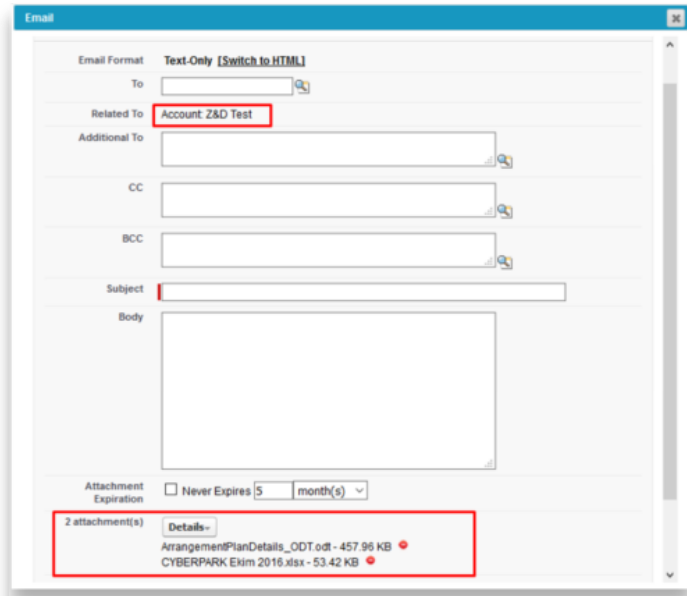


Figure I-52

**Figure I-53**

b.  Select files to send and click Email button (Figure 52). You can see that "Related to" field is populated with related Case. Fill in the other fields and click "Send" button (Figure 53).

### 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.
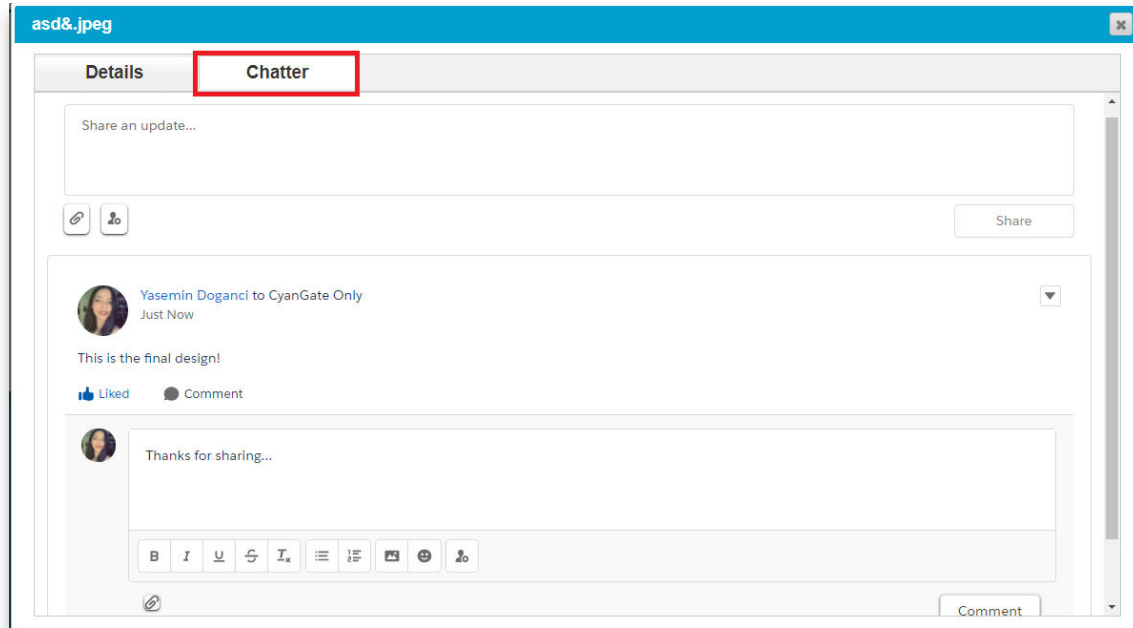


**Figure I-54**

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 and make comments.

*Note: In order to enable chatter, you should enable it using the S-Drive Configurations and 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)"**.

- **One File Download**
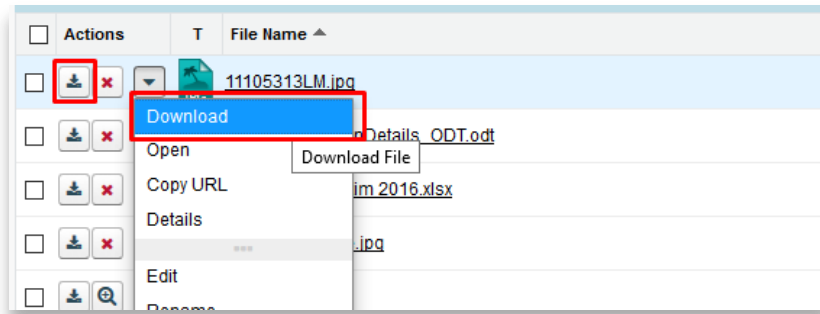
You can download individual files by clicking **"Download"** item menu action and download shortcut button from the "**Item Actions**" button (Figure 55). If "Download" item menu action is selected for file item, download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) (Figure 56). If you select "Download" action for a folder it directs to Zip & Download.
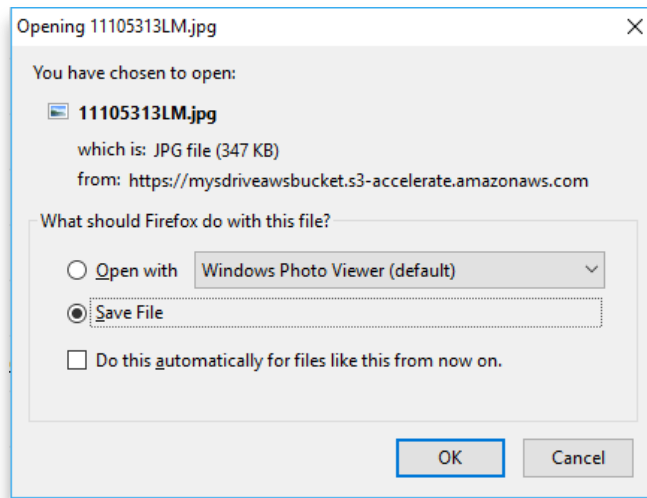


Figure I-56

- **Zip & Download (Multiple File and Folder Download)**

If you choose multiple file and click download button on S-Drive Toolbar, or if you try to download folder by action menu, our service prepares folders and files into a zip file and start to download zip file automatically (Figure 57).
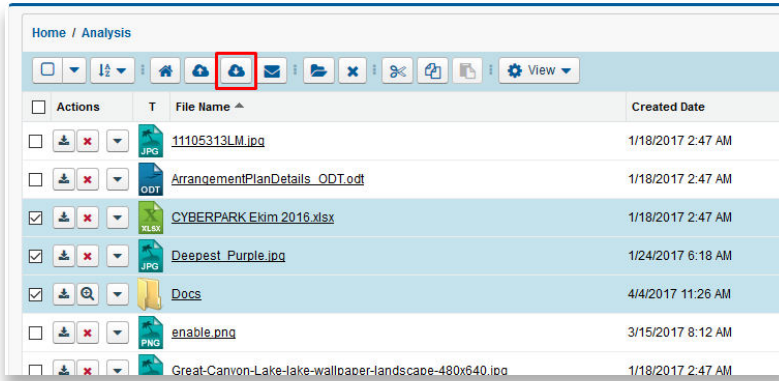
Figure I-57

When you start Zip and Download action, you see an alert box on the bottom side of the page (Figure 58).
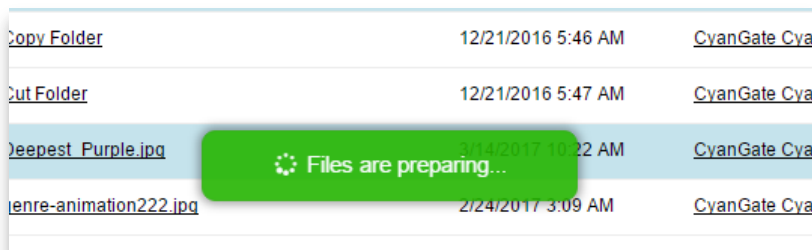


Figure I-58

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 59). 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** .
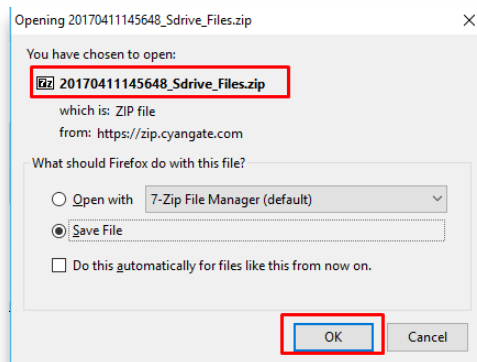


Figure I-59

## J. Opening Files

If you want to open the files automatically, you should click "Open" link (Figure 60).



Figure I-60

*Notes*

1. You should make some configurations for browsers (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) to enable some types of files for opening. You can reference below links:

   Internet Explorer: http://247support.custhelp.com/app/answers/detail/a_id/8892/~/internet-explorer%3A-no-download-prompt-appears
   http://erptraining.niu.edu/erptraining/PS_browser_settings/ie9.shtml

   Chrome: http://blog.rubbersoft.com/2010/01/how-to-automatically-open-downloaded-files-in-chrome/
   http://www.adeptscience.co.uk/kb/article/1379E

   Firefox: http://meruscase.com/customizing-your-experience/how-do-i-auto-open-documents-in-firefox/
   http://kb.mozillazine.org/File_types_and_download_actions

### 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 61).

If sharing is enabled, it will ask if you want to bring the current sharing settings with the cut item(s). You can select "Yes" or "No" based on your decision (Figure 62).

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 63). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.

If there is already a file with that the same inside the target directory, S-Drive will warn you with "Do you want to overwrite?" message (Figure 64).

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

*Notes*

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

### 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 65).
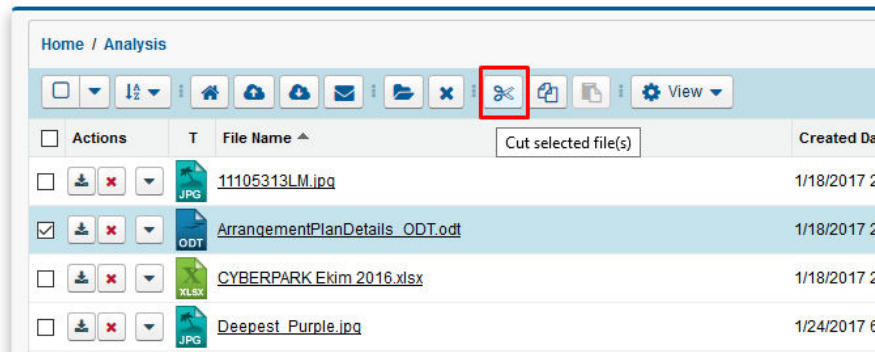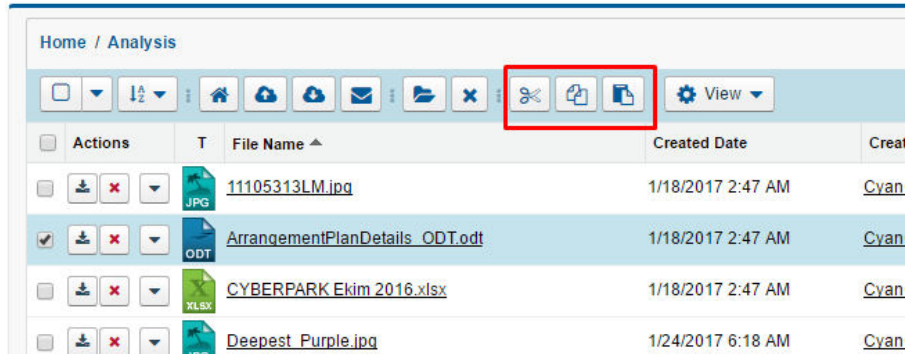


**Figure I-65**

If sharing is enabled, it will ask if you want to bring the current sharing settings with the cut item(s). You can select "Yes" or "No" based on your decision (Figure 66).
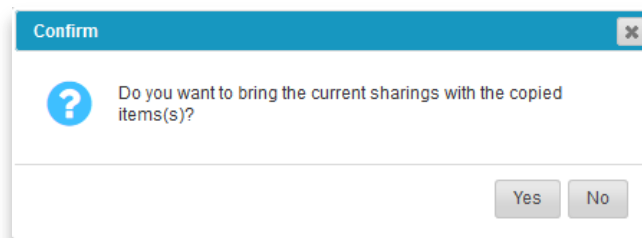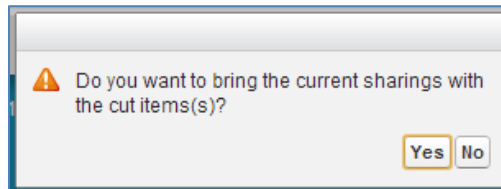


**Figure I-66**

It will start the copy operation and a progress bar will be displayed in the middle of the screen (Figure 67). You can cancel the copy operation anytime by clicking the "Cancel" button. After completion of the copy operation this pop-up screen will disappear.
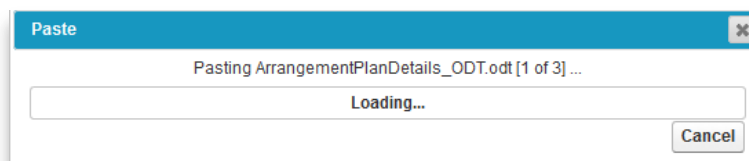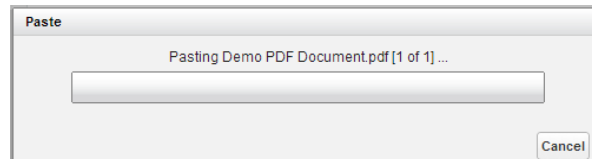


**Figure I-67**

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 68).
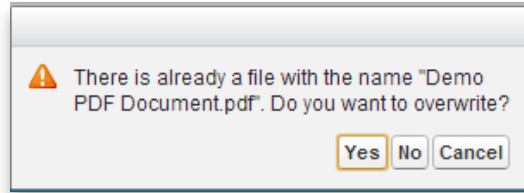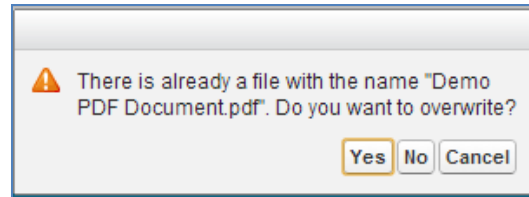
**Figure I-68**

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.

*Notes*

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

### 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 69-1), and type in the new name in the opening Rename screen (Figure 69-2).



**Figure I-69**


*Notes*

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 70).



**Figure I-70**

### 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 71).
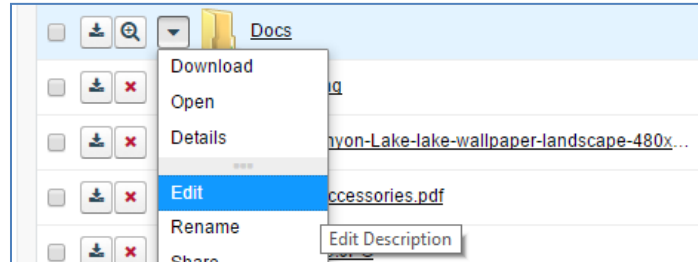


**Figure I-71**

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 will not be updated, and this pop-up will be closed (Figure 72).
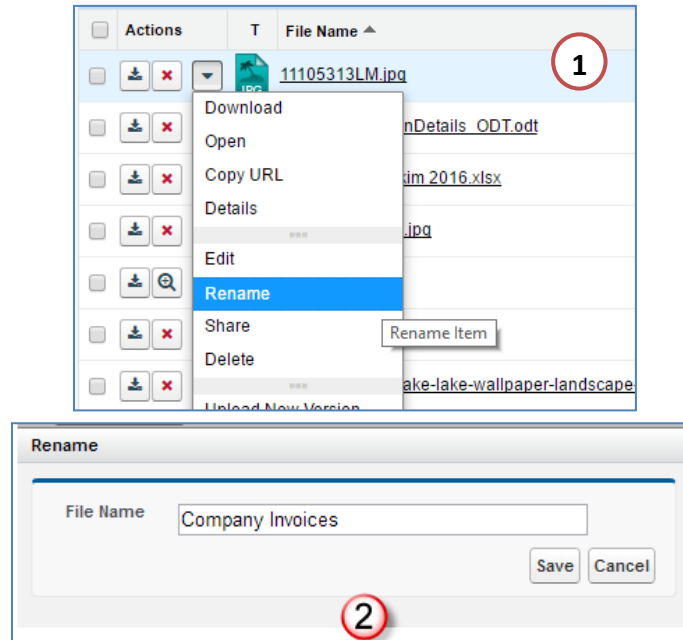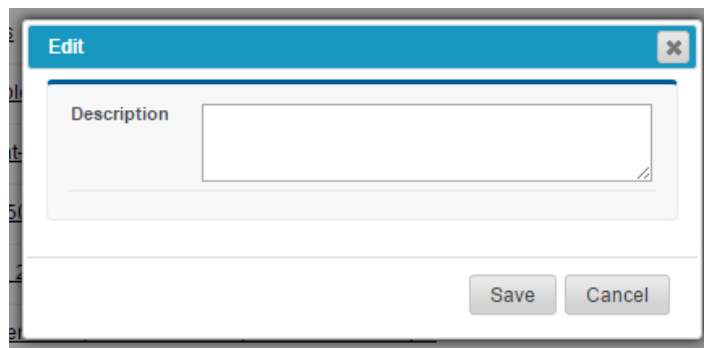


**Figure I-72**

*Notes*

1.  If you try to edit description of a file/folder that you do not have edit permissions, you'll get "You don't have enough permission to update this file!" error message (Figure 73).
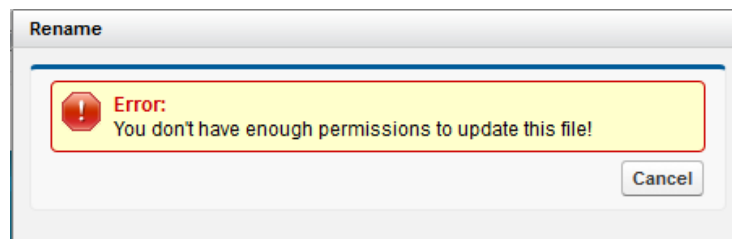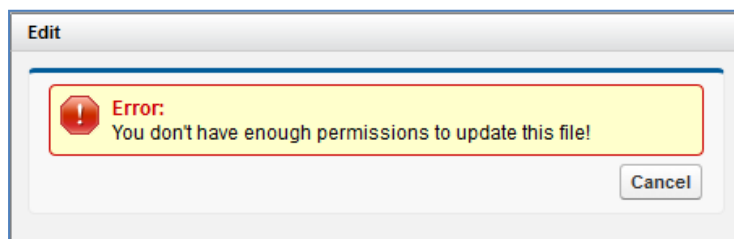


**Figure I-73**

### O.  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 74).
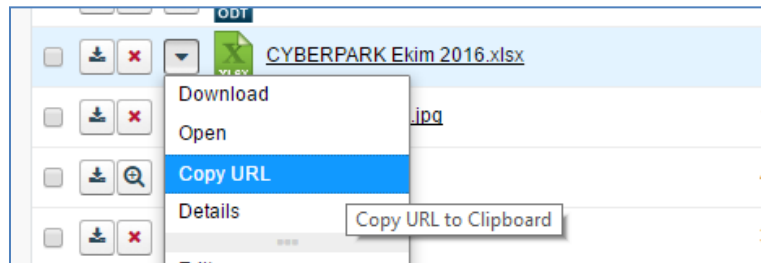
After clicking this button, Copy URL pop-up will be displayed (Figure 75). Select the URL by clicking "Select URL" link in this pop-up. You can close this pop-up by clicking "Close" link.
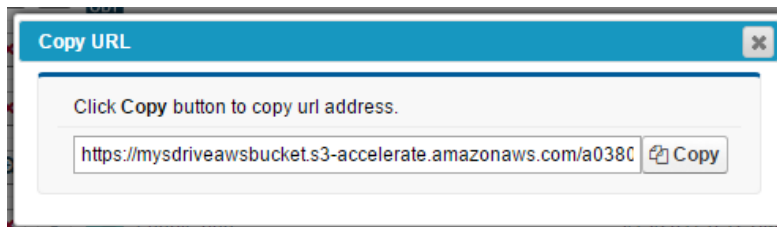


**Figure I-75**

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 76).
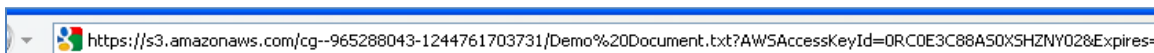


**Figure I-76**

![Notes]

*Notes*

1. This feature is not enabled for folders. Because folders don't have URLs in S-Drive. "Copy URL" item menu action is invisible for the folders.

2. If you want to use shorter URLs, please see S-URL section in "S-Drive Admin 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 77).
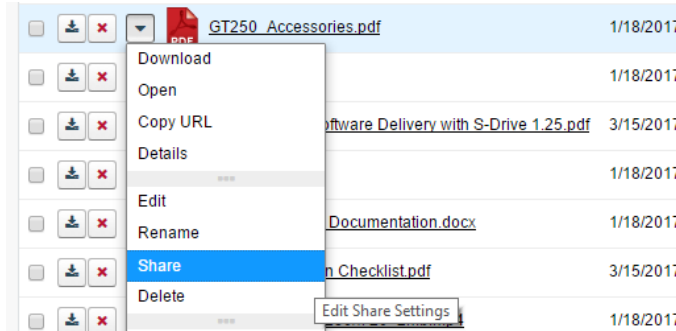
**Figure I-77**

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 78). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.
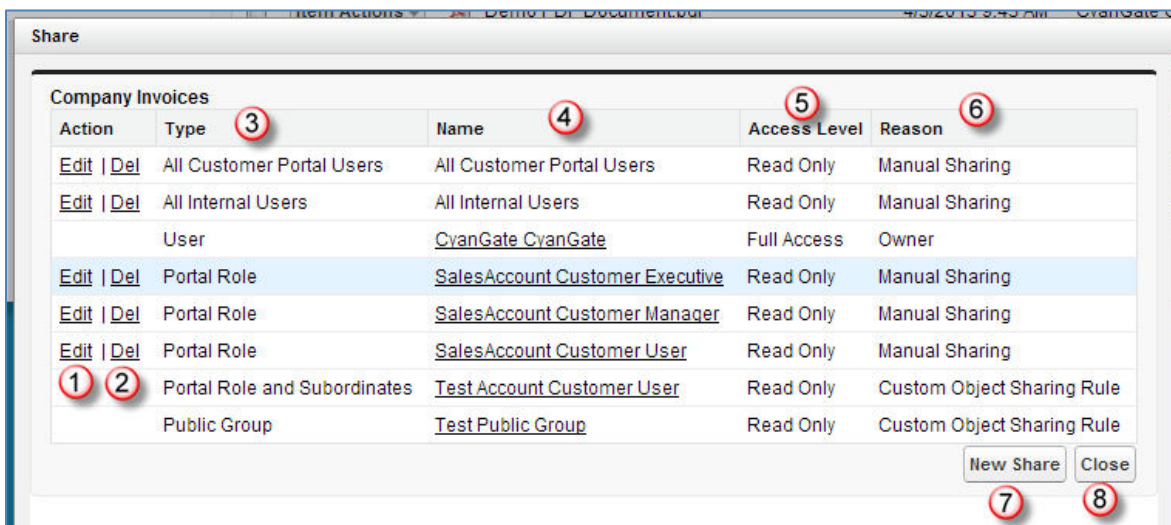


**Figure I-78**

"Action" column is used to edit or delete the manual shares (Figure 78-1 and Figure 78-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 78-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 78-4). 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 78-5). "Reason" column displays the reason of the sharing (Figure 78-6). 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 78-7) and close this screen by clicking "Close" button (Figure 78-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 79). You can select the "Type" from the dropdown (Figure 79-1). Once you select the type, available fields will be listed in "Available" section (Figure 79-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 79-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 79-4). 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 79-5).
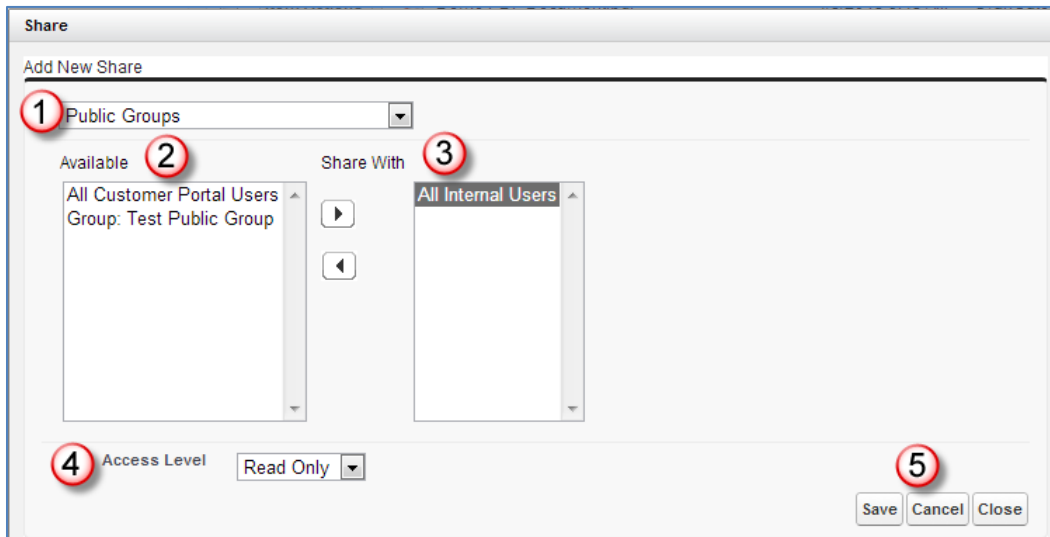


**Figure I-79**

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 78-1). You can change selected object's access level and save (Figure 80).
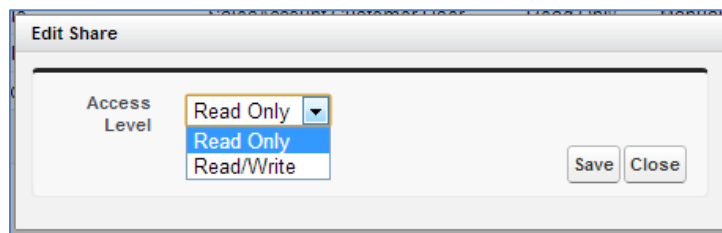


**Figure I-80**

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 78-2). If you select "Yes", share will be deleted (Figure 81).

*Notes*

1.  Sharing items (files or folder) with "Read Only" access level gives allowed shared user/group/ profile etc. read-only access. That means user can see file details, download file, copy file; but cannot edit, delete, move, rename file. If user has "Read Only" access on a folder he won't be able to see "New Folder", "Upload File(s)", "Cut" buttons.

2.  Sharing items (files or folder) with "Read/Write" access level gives allowed shared user/group/ profile etc. read-write access. That means user can see file details, download file, copy, edit, delete, move, and rename file. But cannot delete the file. Only file/folder owner can delete the file.

3.  If no sharing is given to the user on a folder, user won't be able to see the folder and its contents.

4.  Sharing folders affects sub files and folders. So, if you share a folder, that sharing will be applied to sub files and folders.

5.  If sharing is enabled and if you're in a subfolder (not Home folder), you'll see "Inherit Sharing from Parent Folder" checkbox when creating a folder or uploading files. Default is checked. You can uncheck this checkbox if you do not want to inherit shares from parent to the newly created folder or file (Figure 82) at the time of creation.

Figure I-82

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 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.

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## 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 83). Only HTML Upload Manager supports version upload.
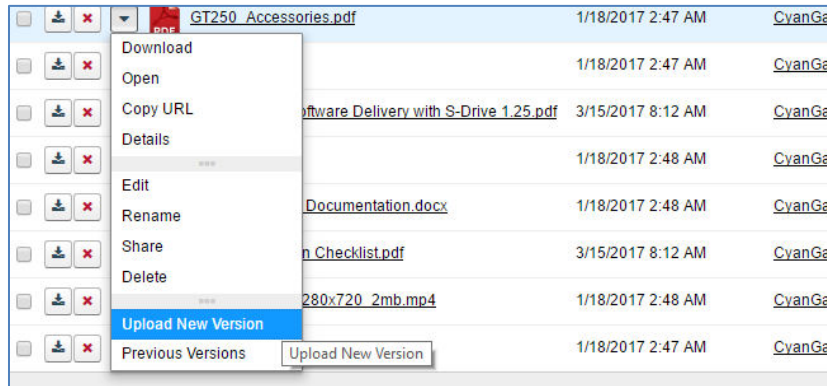


**Figure I-83**

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 84).
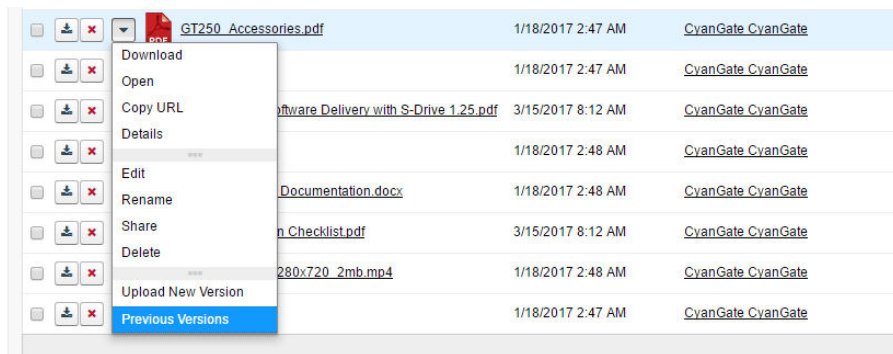


**Figure I-84**

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 85)
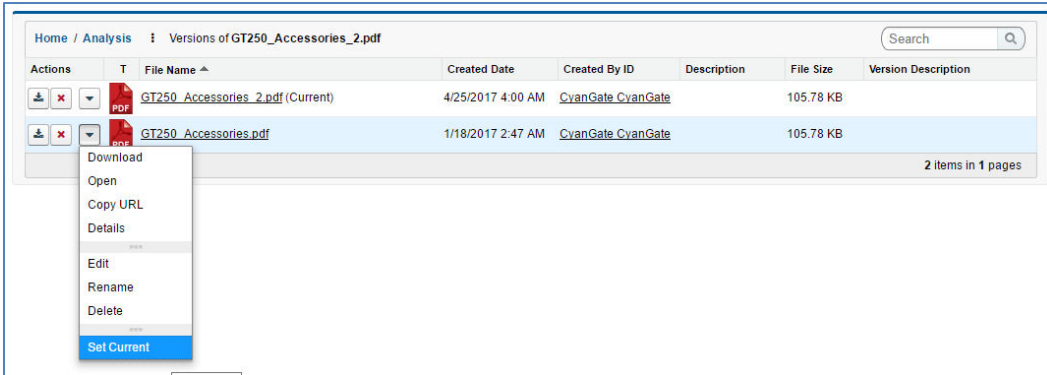
You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

You can also see the current version with highlighted and indicated in the file name. (Figure 73)
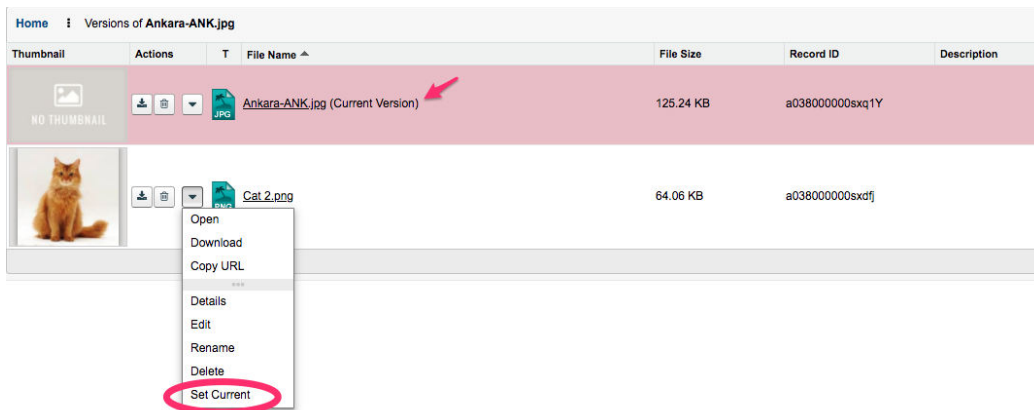
## S.    Check-In & Check-Out

Check-In & Check-Out lets you lock files, preventing others from modifying or deleting the file while you're working on it. If the feature is enabled from the configuration page, a file without any lock has "Check-Out" option under its action menu and its details page shows a check-out button.

After clicking Check-Out, nothing changes for you as the user who checked out the file. You can still modify the file, delete it, or upload a new version to it. You can see a small lock icon under the STATUS column, indicating that the file is checked-out.

However, for other users, the file can no longer be edited or deleted. The delete button becomes disabled, and the action menu has fewer options to choose from.

If a user has the special RemoveLockPermission custom permission, or if you are the System Administrator, you get the right to check-in files without waiting for the user who checked-out that file.

When the user who checked-out the file uploads a new version, the file is checked-in automatically. When a file with previous versions is checked-out, all previous versions become checked-out as well.

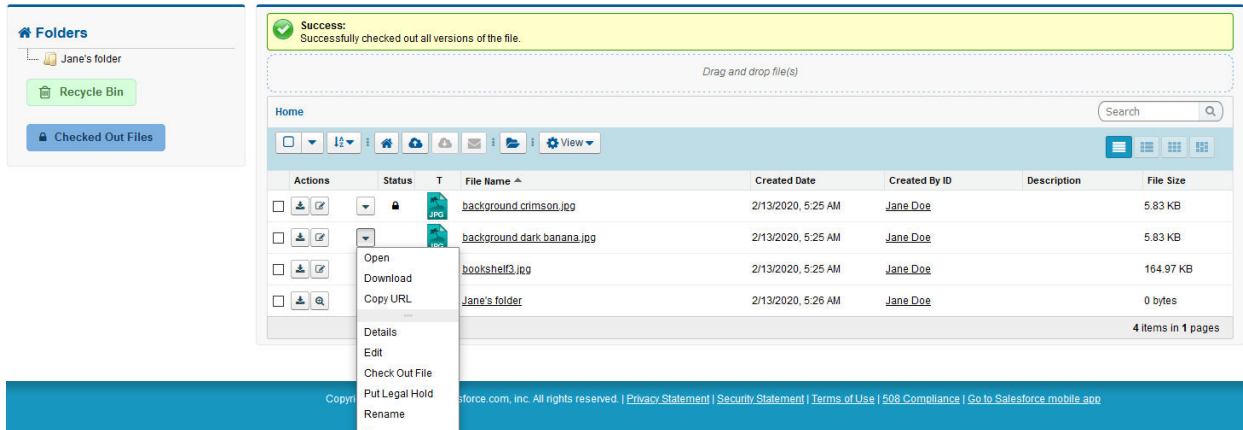The "checked out files" folder (displayed under the recycle bin) shows all files that the user can check-in. If someone is a Sys Admin or has RemoveLockPermission, files checked-out by other users will be shown, otherwise only the files checked-out by that user

## T.     Legal Hold

Legal Hold is lets you lock files, preventing others from modifying or deleting the file. It is similar to Check-In & Check-Out but with some minor differences. File objects that can be put under legal hold should be explicitly selected from the S-Drive configuration page, and only certain users, i.e., System Administrators and holders of RemoveLockPermission, can put files under legal hold and remove files from legal hold.

If the feature is enabled from the configuration page and the file object (e.g. cg__S3Object__c) is selected, a file that isn't under legal hold would have a button called "Put Legal Hold" under its action menu, and its details page contains a "Put Legal Hold" button.

After clicking "Put Legal Hold", nothing changes for you as the user who put the file under legal hold. You can still modify the file, delete it, or upload a new version to it. You can see a small gavel icon under the STATUS column, indicating that the file is under legal hold.

However, for other users, file can no longer be edited or deleted.  The delete button becomes disabled, and the action menu has fewer options to choose from.

If a user has the special RemoveLockPermission custom permission, or if you are the System Administrator, you get the right to remove files from legal hold without waiting for the user who put them under legal hold in the first place.

When the user who put the file under legal hold uploads a new version, the new versions are also put under legal hold.

When a file with previous versions is put under legal hold, all previous versions are put under legal hold as well.

## U.    File Activities

When File Activities are enabled in S-Drive Configuration, the file activities recorded for a file record are displayed in file record's detail page under "Audit" tab.



Figure I-88

Here all file activities recorded for the file will be displayed in a tabular format sorted by Created Date. You can change the sort order by clicking each header in the table: Activity Type, Created By or Created Date.

*Note: It is not possible to sort by Additional Details column.*

You can also navigate through pages using the pagination buttons at the right top corner. Each page has 20 file activity records.

In order to view filters and filter the file activity records for a specific file record, click on the "Filters" button on the top left corner of the table.



**Figure I-89**

Here you can select the type of activities using the checkboxes, to change the displayed activities based on type. You can also apply a date range in order to see the activities recorded between specific dates. In order to apply filters, click on "Apply Filters" button. To clear all filters on checkboxes and dates, click on "Clear Filters" button. This way, all file activities will be listed in the table. You can click on "Filters" button to close the filters section.

*Note: If you enter an invalid date for Start Date or End Date, a warning message will show up.*

## V.      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 87).

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

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

Figure I-90


*Notes*

1. Salesforce.com does not index uploaded files immediately, so newly uploaded files will be eligible for search in a few minutes after the upload.

2. 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 88-1).
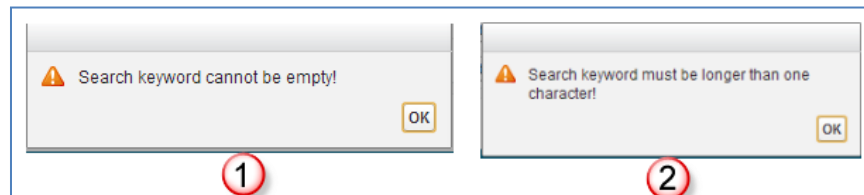


Figure I-91

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 88-2).

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

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments (Figure 89).



Figure I-92

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 90).
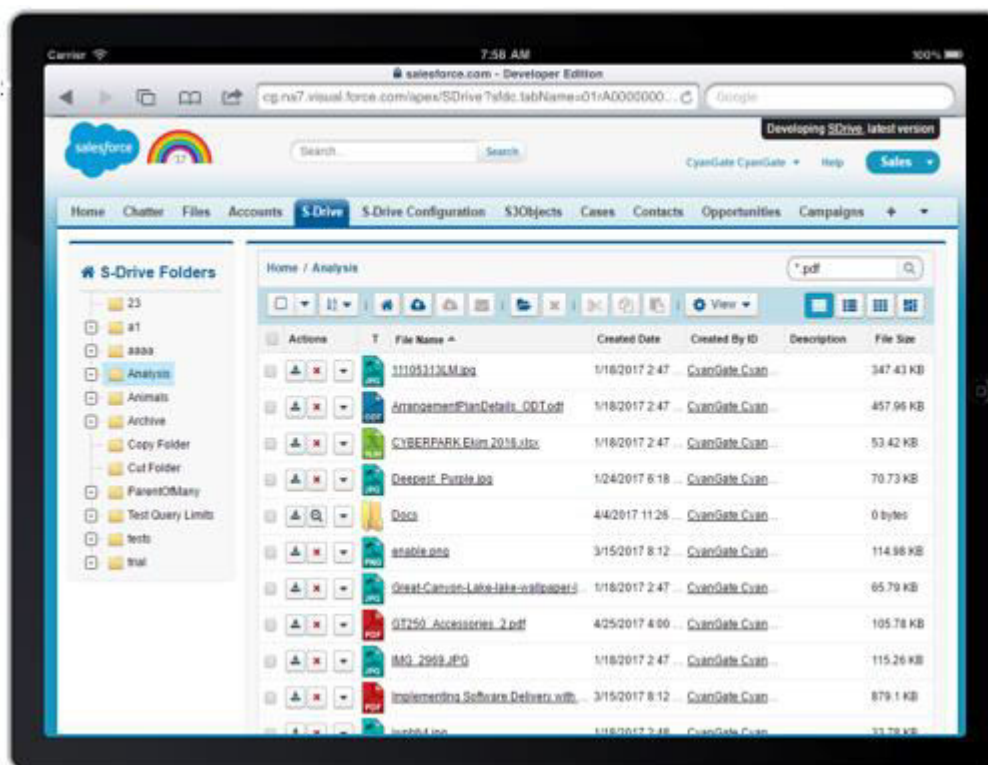


Figure I-93

But currently you **cannot upload files, download files using Download Manager for bulk download** with your iOS device. Because iOS devices do not support Flash and Java technologies that our upload widgets use. We're planning to add upload feature in next releases.

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

Below is a screenshot of the Case Files section from an iPad device (Figure 91).



Figure I-94

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## X. 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 Admin Guide".

- **Account Files**

After installing S-Drive, if you made the configuration correctly, you will be able to create account files in "Accounts" tab fo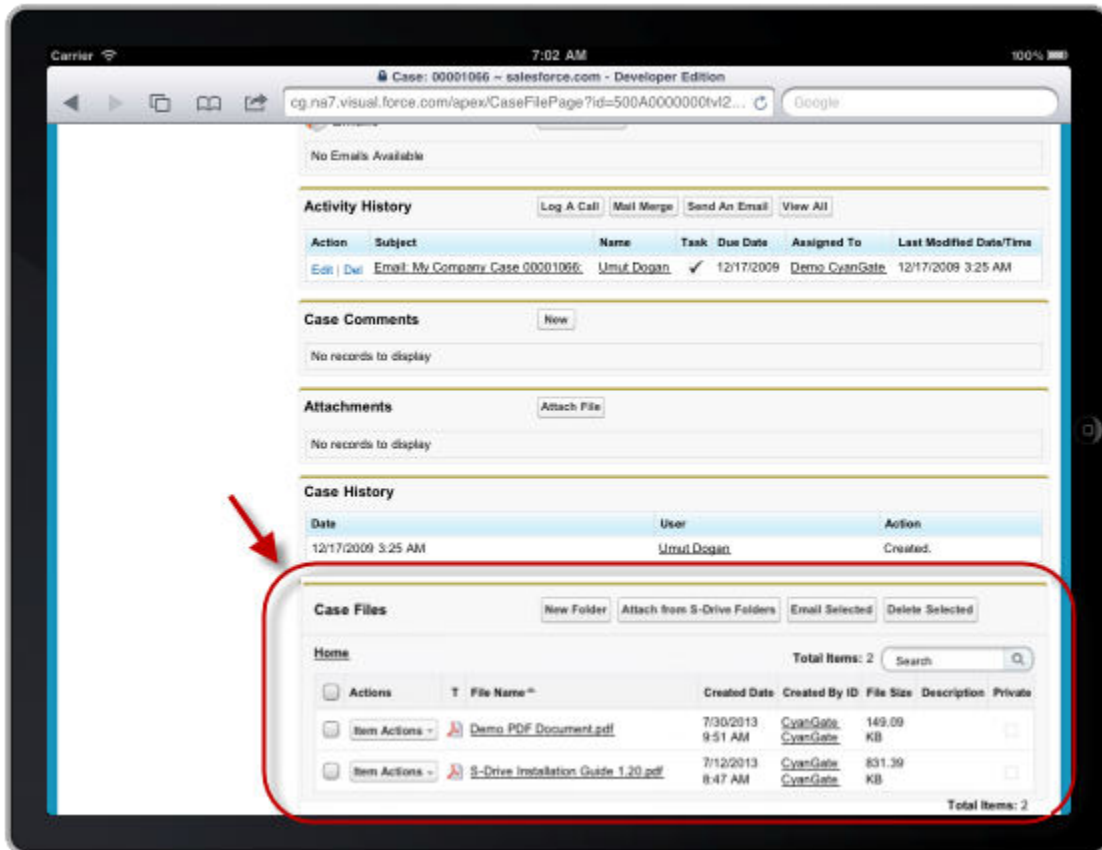r each account easily. Go to your "Accounts" tab, select an account from the list (or create a new account). If you can see the "Account Files" page block in the current account's page, you can keep on reading (Figure 92). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.
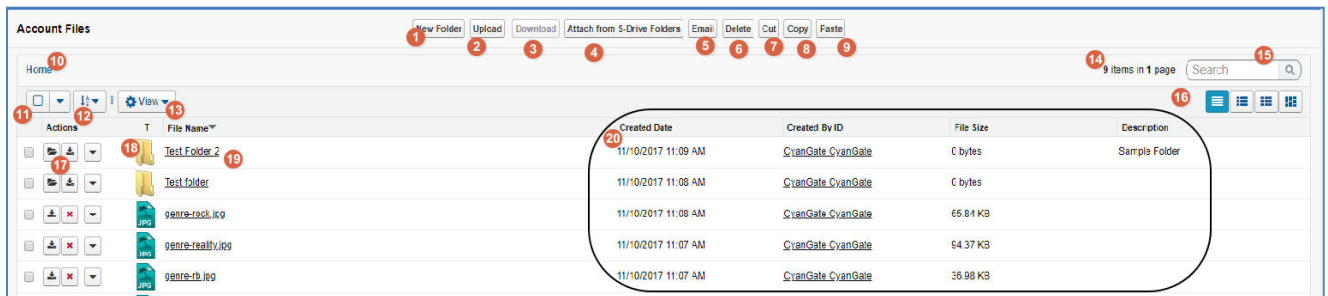


**Figure I-95**

**(1)** **"New Folder Button":** This button is used to create new folders (Figure 92-1). 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 93).
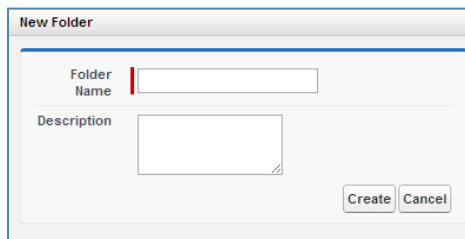


**Figure I-96**

(2) **"Upload File(s) Button"**: This button is used to add account files to this account (Figure 92-2). After clicking this button "Upload Files" screen will be initialized (Figure 94).

You can select files to upload. This screen is like the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.



**Figure I-97**

(3) **"Download" Button**: Only when a file or folder selected, this button will be enabled. 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 92-3).

(4) **"Attach from S-Drive Folders" Button**: This button is used to attach files from S-Drive Folders to this account (Figure 92-4). 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 95-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 95-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 95-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 I-98**

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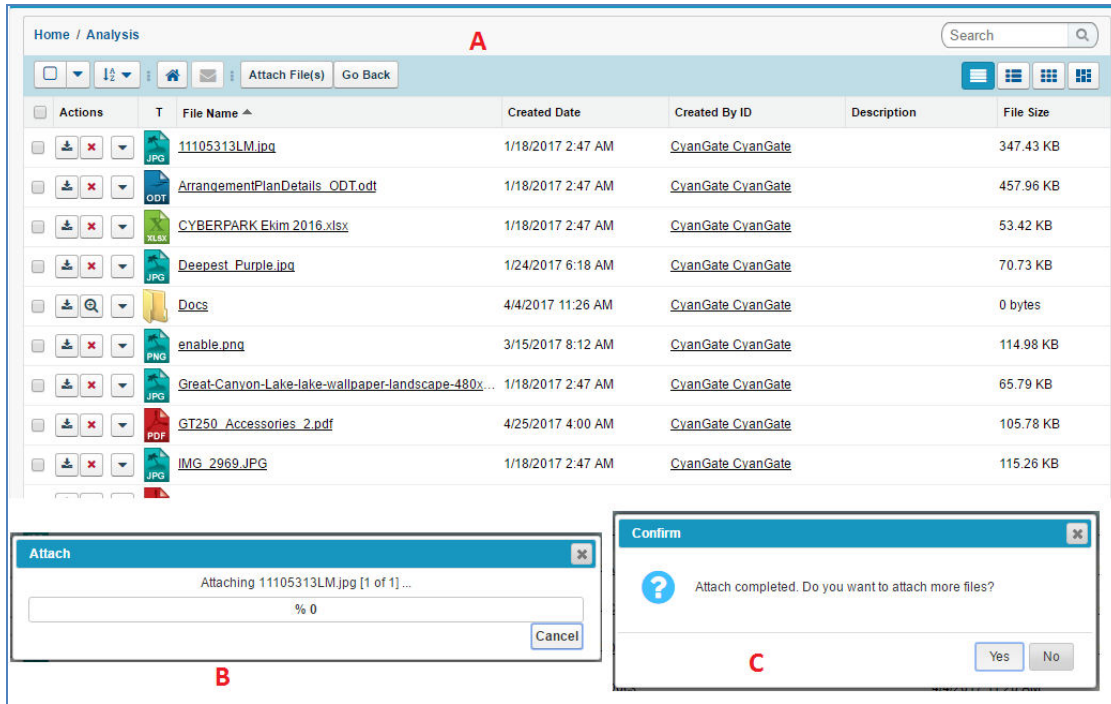
1. If versioning is enabled and selected file has versions, only latest version of the file will be attached.

(5) **"Email" Button:** This button is used to email selected account files (Figure 92-5). 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 96). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is like the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.
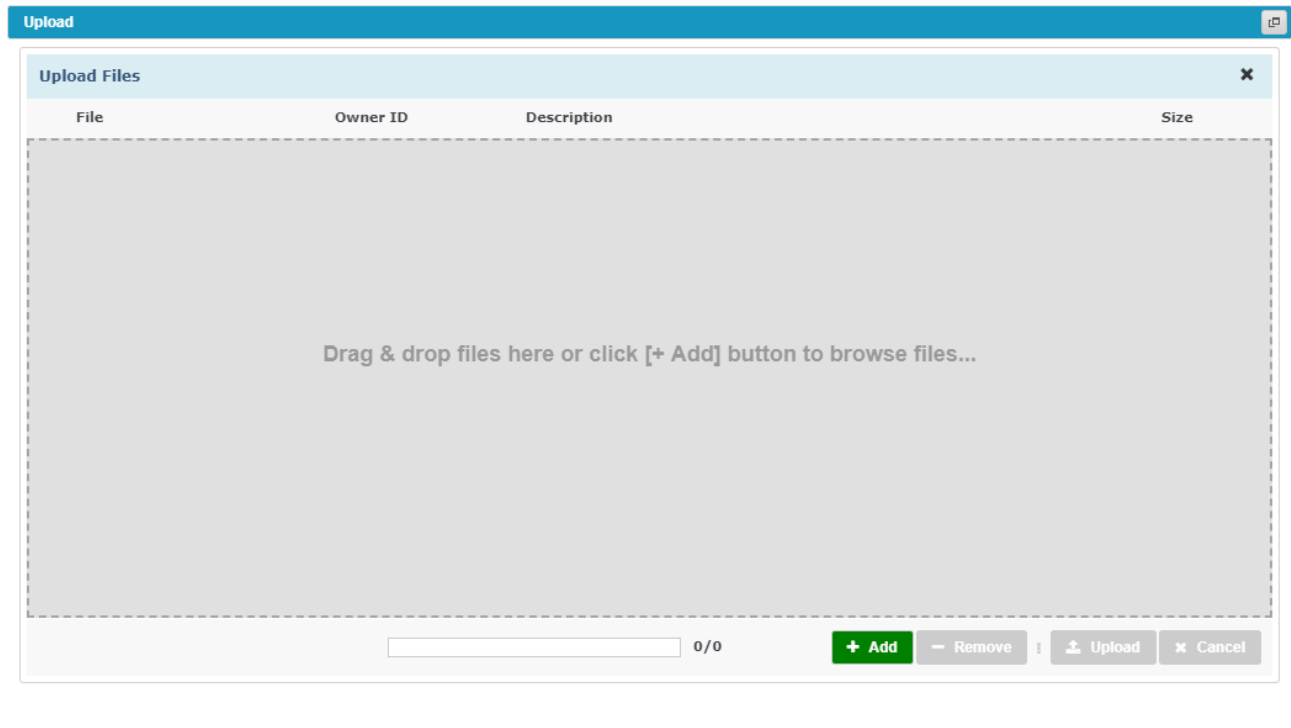


**Figure I-99**

**(6) "Delete Selected Button"**: This button is used to delete selected account files from current account (Figure 92-6). 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 97-A). Select "Yes" to delete, "Cancel" to 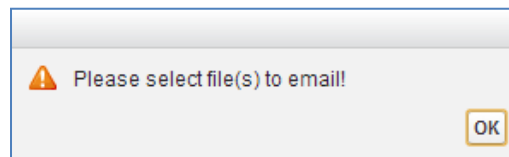cancel. If you do not make any selection and click "Delete Selected" button, you'll get an error message (Figure 97-B). If you click "Yes", delete process will start.
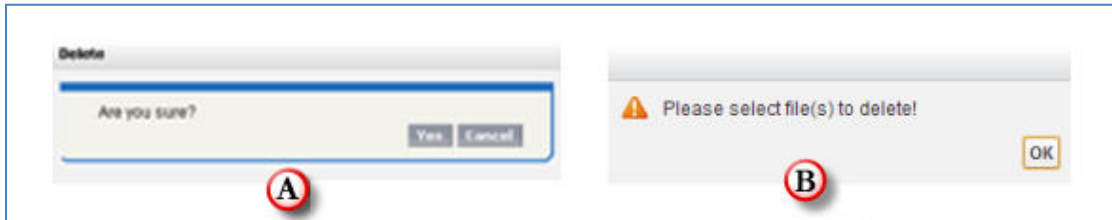


Figure I-100

*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 92-7). You can click folders above to go to that folder.

**(11)"Selection" Buttons**: (Figure 92-8)

     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 92-9). 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 92-10), you can set current view type as default for the object you are on. İ.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 92-11). 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 98). Total items include only current folder items, not subfolder items. For example, if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
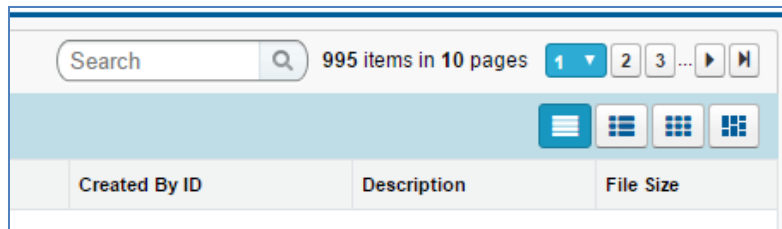


**Figure I-101**

(15)**"Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 92-12 and Figure 99). 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.



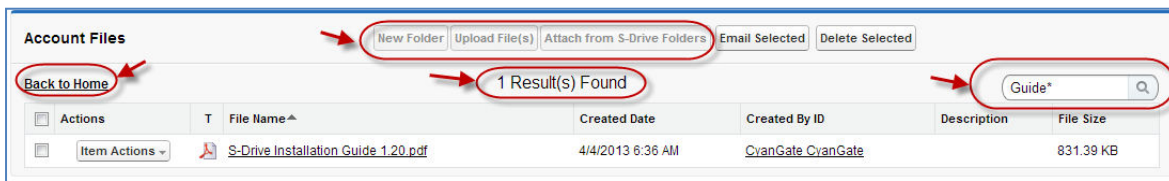**Figure I-102**

(16) **"View Type Buttons":** By using these buttons group (Figure 92-13), 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 92-14). Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 92-9).

- **"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 100). 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 101). This item menu action is only for files and not available for folders.
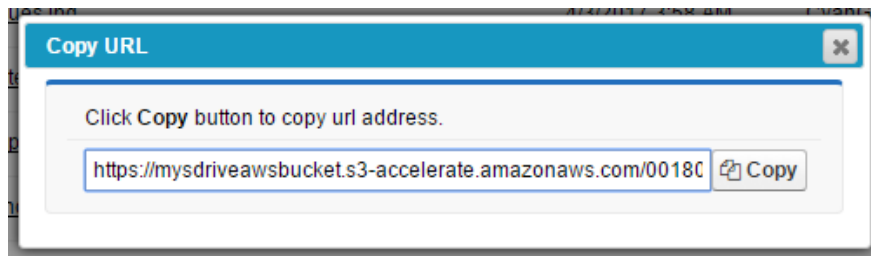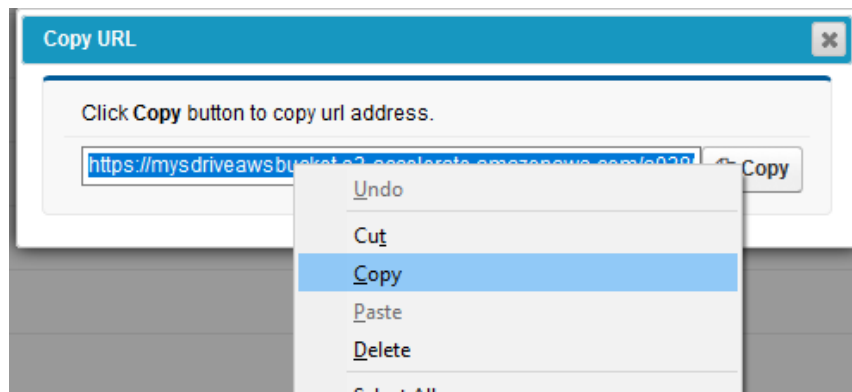


**Figure I-103**



**Figure I-104**

- **"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 102) 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.
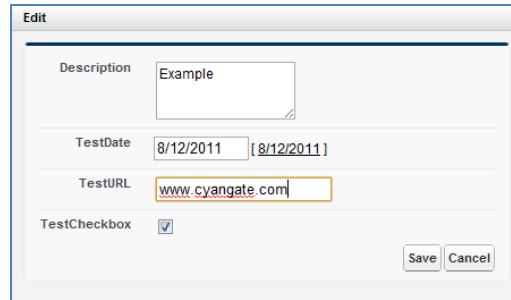
Figure I-105

- **"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 97-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.

*Notes*

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 103). Only HTML Upload Manager supports version upload.
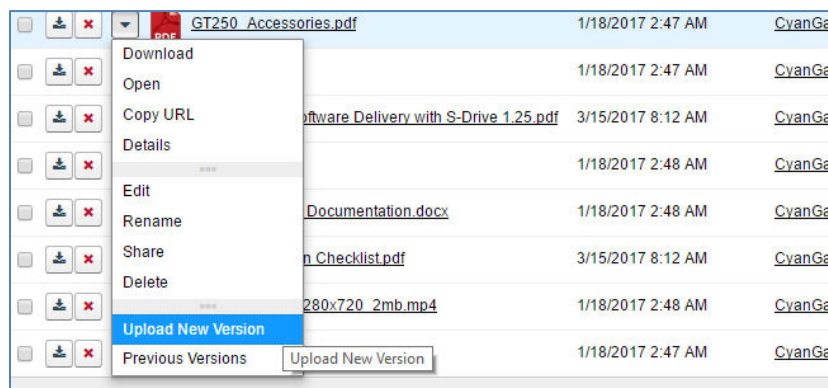


Figure I-106

- **"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 104).
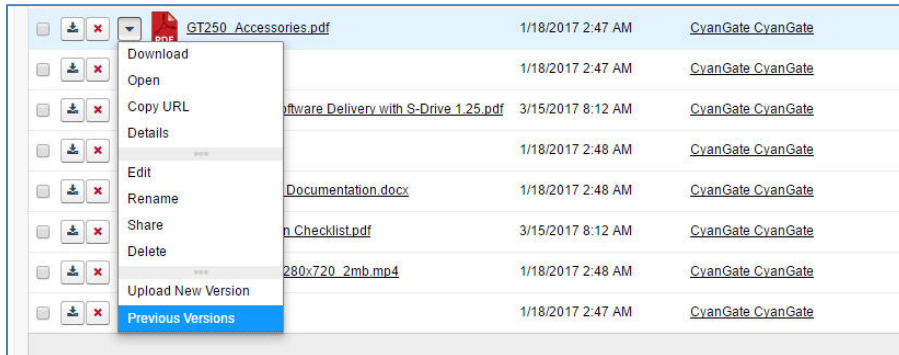


**Figure I-107**

- **"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 105).
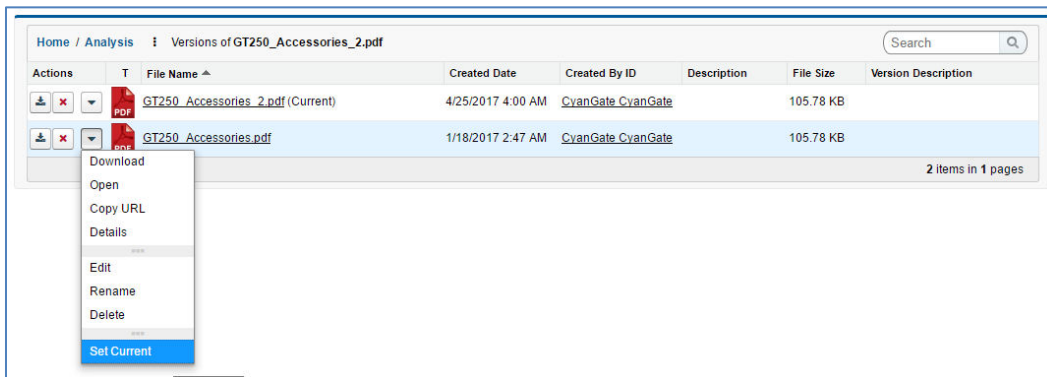


**Figure I-108**

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 92-15).

**(19)"File Name Column"**: File name information for the account files (Figure 92-16). 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 92-17). Your Salesforce.com account's system administrator can change this customizable list

using "S-Drive Configuration" page. If nothing is configured, you will 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 106). You need to delete account files first, and then you can delete the account.
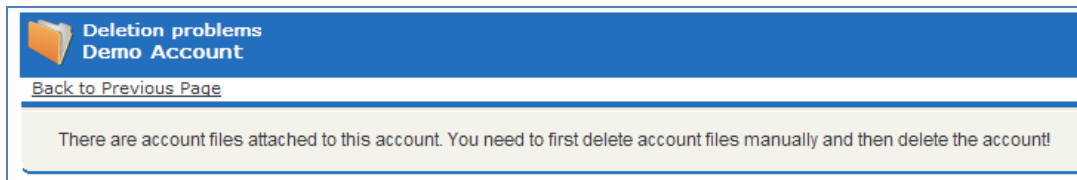


**Figure I-109**

- **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 (**Error! Reference source not found.**). Otherwise please consult to the "*S-Drive Admin Guide*" to activate "<Your Object Name> Files" section.
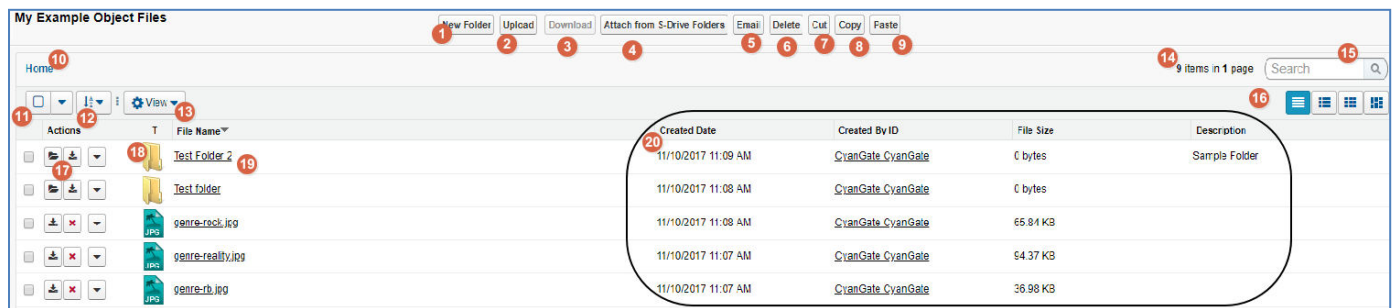


**Figure I-110**

(1)  **"New Folder Button":** This button is used to create new folders (Figure 107-1). 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 108).

Figure I-111

(2) **"Upload File(s) Button"**: This button is used to add case files to this case (Figure 107-2). After clicking this button "Upload Files" screen will be initialized. (Figure 109)
You can select files to upload. This screen is like the "Upload Screen" reviewed in "Uploading Files" section. You can refer to this section for more information about uploading files.



Figure I-112

(3) **"Download" Button**: Only when a file or folder selected, this button will be enabled. 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 92-4). 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 95-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 95-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 95-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.
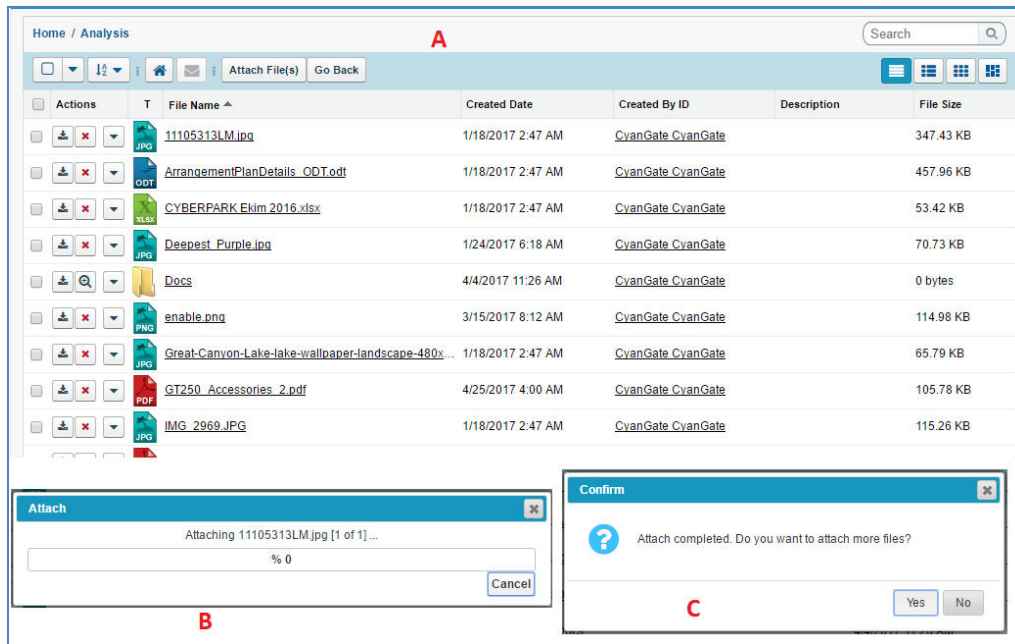


Figure I-113

![Notes icon]*Notes*

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 92-5). 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 will get a warning message saying, *"Please select file(s) to email!"* (Figure 96). After making selections and clicking the "Email Selected" button, "Email Files" screen will be opened. This screen is like the "Email Screen" reviewed in "Emailing Files" section. You can refer to this section for more information about emailing files.
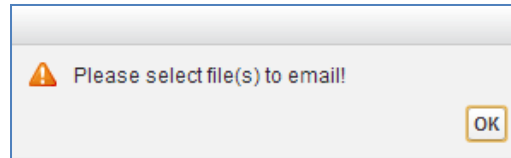
Figure I-114

(6) **"Delete Selected Button"**: This button is used to delete selected case files from current case (Figure 92-6). 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 97-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 97-B). If you click "Yes", delete process will start.
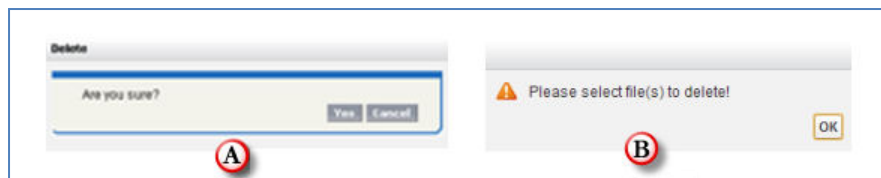


Figure I-115

 *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 92-7). 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. İ.e. you can set Case Objects default view type as Grid View type. Whenever you open a 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 92-11). 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 98). 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$^{nd}$ page. Pagination section is displayed in two places: Next to the search box and at the right-bottom corner of the file list.
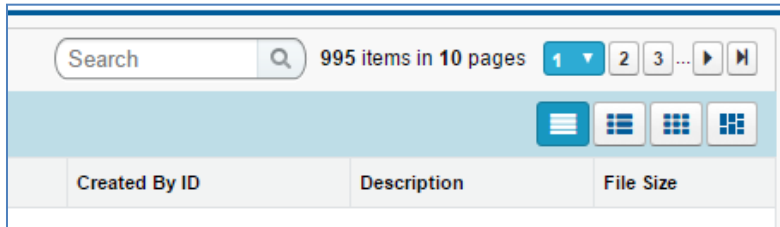
**(15)"Search Box":** You can search for files and folders inside S-Drive Attachments (Figure 92-12 and Figure 99). To start a search, type the search criteria to the right corner of S-Drive Attachments section, into the search box and click Enter. You can use wildcards, '**\*** (multiple characters), **?** (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.
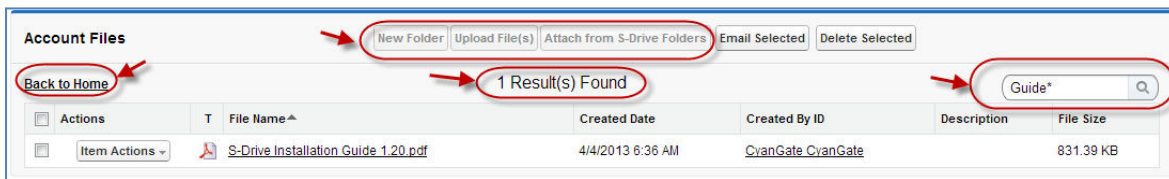


Figure I-117

**(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 92-14).

- **"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 100). 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 101). This item menu action is only for files and not available for folders.
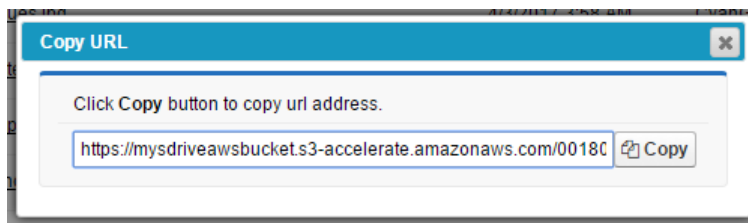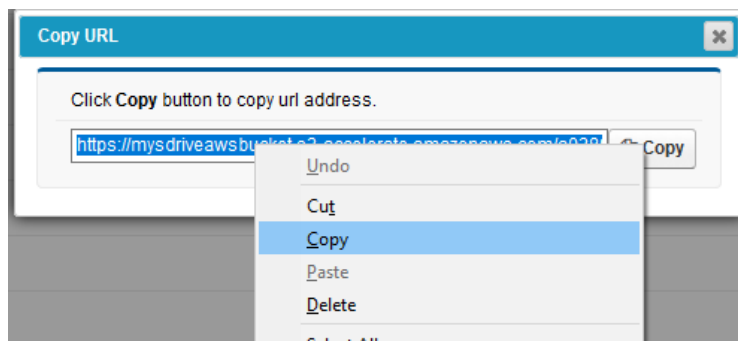


Figure I-118



Figure I-119

- **"Edit"**: Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 102) 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.
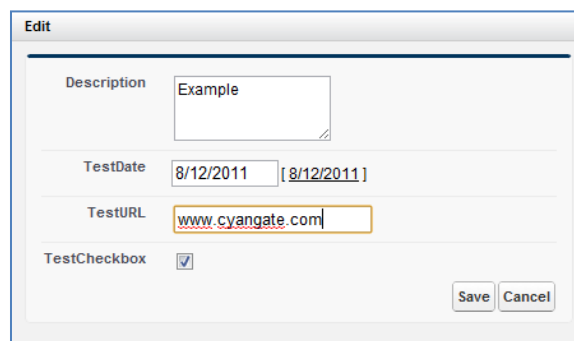


Figure I-120

- **"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 97-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.

*Notes*

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 118). Only HTML Upload Manager supports version upload.
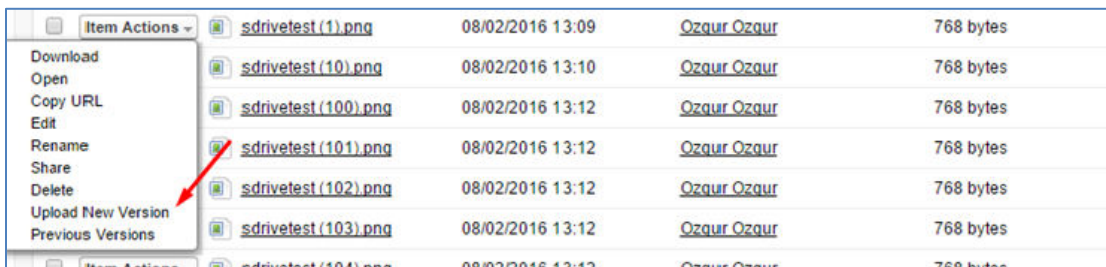


**Figure I-121**

- **"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 119). 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.
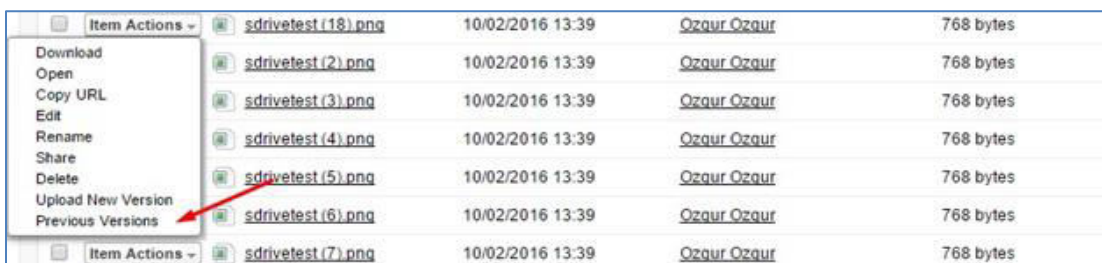


**Figure I-122**

- **"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 120).



**Figure I-123**

(1) **"Content Type Column":** Displays a type icon based on the content type of the custom object file/folder files (**Error! Reference source not found.**-1).

(2) **"File Name Column"**: File name information for the object files (**Error! Reference source not found.**-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 (**Error! Reference source not found.**-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured, you will 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 (**Error! Reference source not found.**-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 98). Total items include only current folder items, not subfolder items. For example, if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2nd page. 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 (**Error! Reference source not found.**-5 and Figure 99). 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 (**Error! Reference source not found.**-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 Admin 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 (**Error! Reference source not found.**-7). See *"Download Manager Download"* section for more information about download manager.

*Notes*

1. If your system administrator set a before delete trigger for your object you cannot delete an object which has object files attached. You'll get an error message if you try to delete this kind of object (Figure 121). You need to delete object files first, and then you can delete the object.
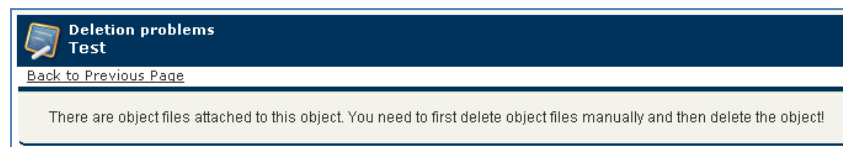
**Figure I-124**

2. You can use "<Your Object Name> Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Admin Guide* and *S-Drive Customer Portal Guide* for more information), your customers can add object files to your objects using "Customer Portal Interface".

## Y.    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.

- **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 122).



*Figure I-125*

**Item Actions**

**1-** Downloading Files

You can download a file by clicking **"Download"** item menu action under the "Item Actions" button (Figure 123).
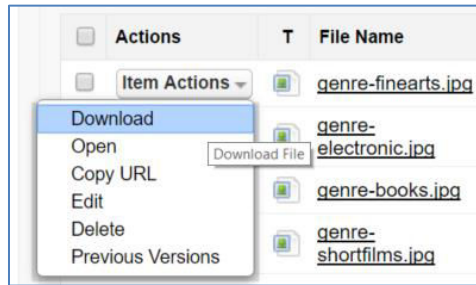


**Figure I-126**

**2-** Opening Files

You can open a file by clicking **"Open"** item menu action under the "Item Actions" button (Figure 124).
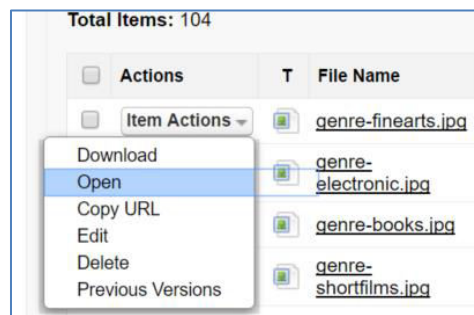


**Figure I-127**

**3-** Copy URL

You can Copy URL of a file by clicking **"Copy URL"** item menu action under the "Item Actions" button (Figure 125). After clicking Copy URL, you can select full URL and copy it (Figure 126).
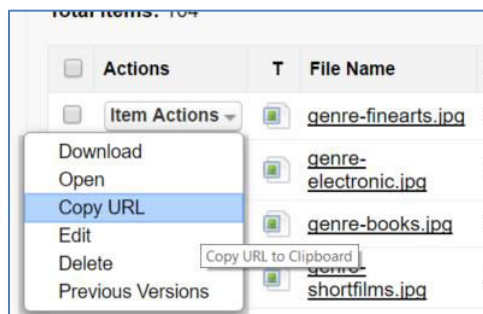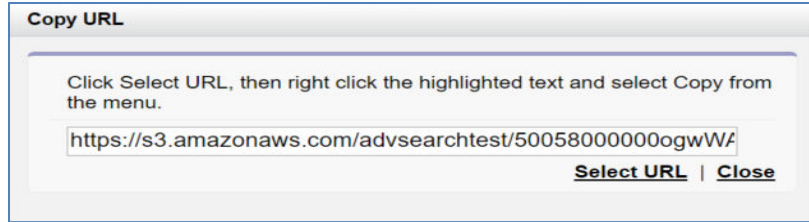


**Figure I-128**

**Figure I-129**

**4-** Editing Files

You can edit a file by clicking **"Edit"** item menu action under the "Item Actions" button (Figure 127). After clicking Edit, you can edit Description of file and save it. (Figure 128).
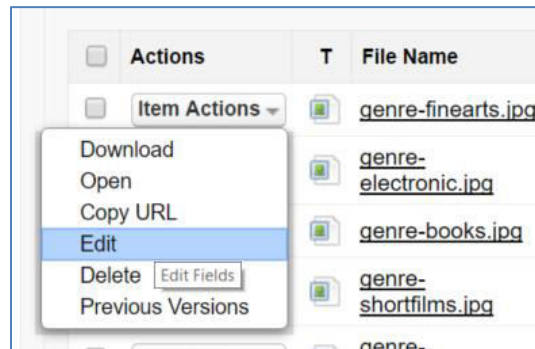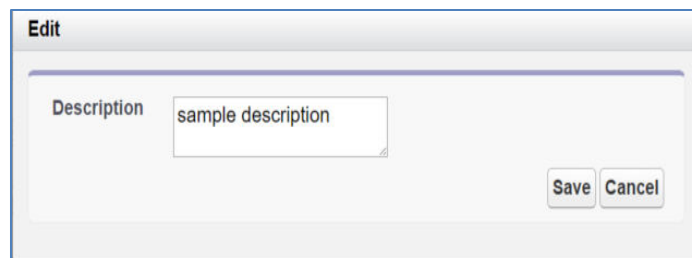


**Figure I-130**



**Figure I-131**

 *Notes*

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

**5-** Deleting Files

You can delete a file by clicking **"Delete"** item menu action under the "Item Actions" button (Figure 129).
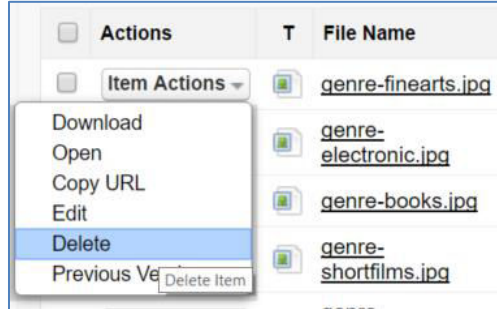


**Figure I-132**

*Notes*

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

**6-** Previous Versions

You can display previous versions of files by clicking **"Previous Versions"** item menu action under the "Item Actions" button (Figure 130). After clicking on it, version history of the file will be listed (Figure 131).
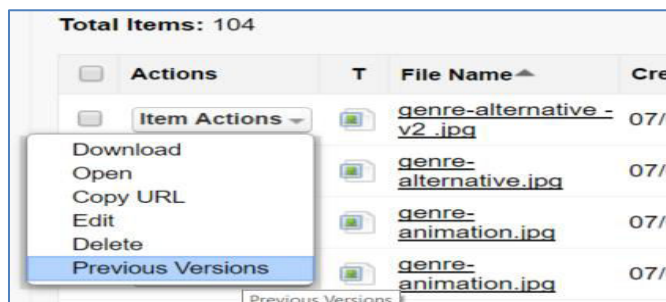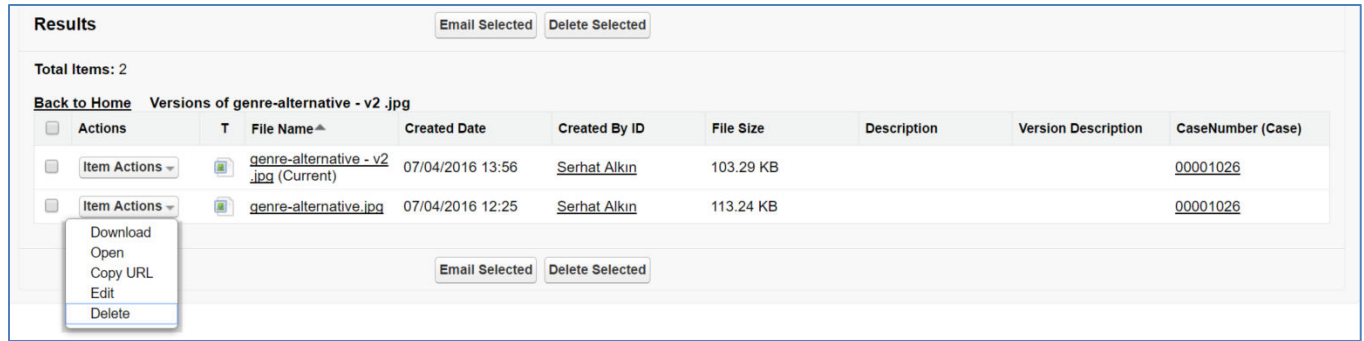


**Figure I-133**

**Figure I-134**

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


*Notes*

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

**Email Selected and Delete Selected**

You can select one or multiple files by using checkboxes in results table and you can Email these files by clicking "Email Selected" button (Figure 132).

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 132).
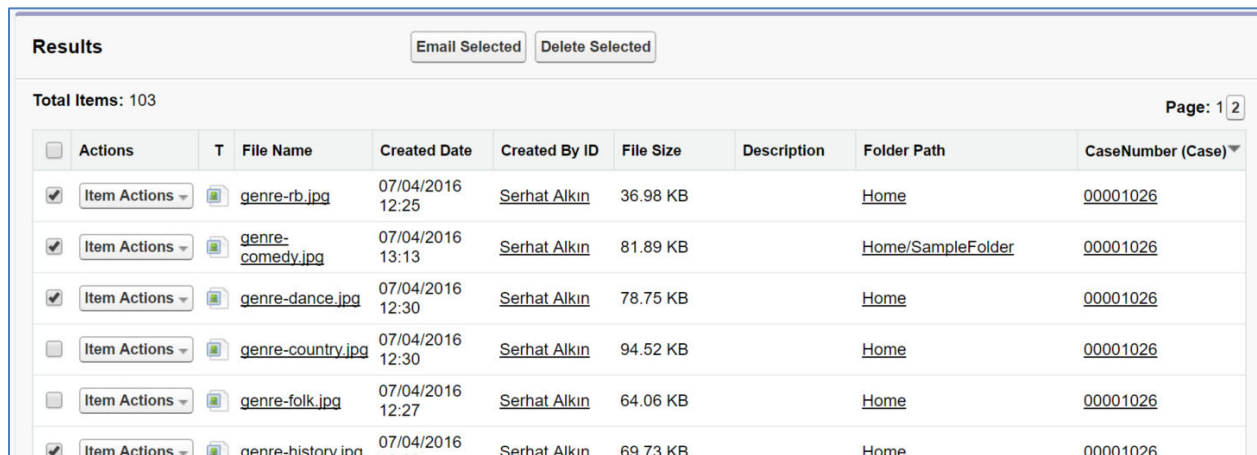


**Figure I-135**

**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 133). "Previous Versions" screen doesn't support "Folder Path" column.

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

**Figure I-136**

- ### 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 134);



Figure I-137

## II.    USER GUIDE FOR SALESFORCE LIGHTNING EXPERIENCE

This section includes information about how to use S-Drive in Salesforce Lightning Experience.

### 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:

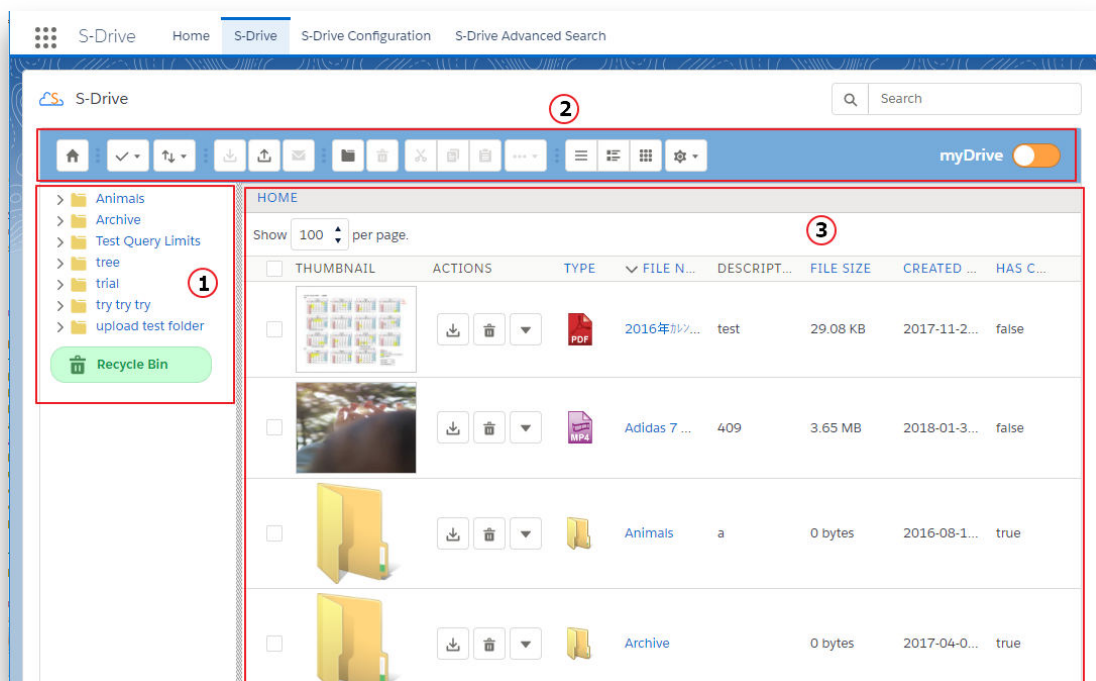**Figure II-1**

### 3.   S-Drive Folders

Left panel (Figure 135-1) is the **"Folders"** panel. It displays your account's folder structure. Your home folder is named as **"Home"** and your folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will show its contents on the panel when clicked.

## S·DRIVE

### 4. Toolbar

Top panel (Figure 135-2) is the **"Toolbar"** panel. It displays breadcrumb navigation for folders, search box, action buttons and view type buttons.



<p align="center"><b>Figure II-2</b></p>

(a) **"Breadcrumb Folder Navigation"** keeps the current folder information. For example, if you are under *"Home/Animals/Cats"* folder, the location information will be displayed in this area (Figure 136-a). You can click any level to drill down to that subfolder.

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

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

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

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

(f) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 136-f). This item is not displayed for the "Search Results View".

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

(h) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 136-g).

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

**(j)** **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 136-h). This item is not displayed for the "Search Results View".

**(k)** **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 136-i).

**(l)** **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 136-j).

**(m)** **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 136-k).

**(n)** **"Paste"** button is used to paste the copied or cut file(s) to a folder. This button is not visible until files are selected for cut/copy. See "Moving Files" and "Copying Files" sections for more information (Figure 136-l). This item is not displayed for the "Search Results View".

**(o)** **"Custom Actions"** button is used to perform custom actions. See "Custom Actions" section in "S-Drive Admin Guide" for more information.

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

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

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

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

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

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

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

d. **"Hide Folders Tree View":** If this item is selected, left panel shown in Figure 135-1 will not be shown.

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

(u) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 136-q).

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

## B.     Compact S-Drive Screen

The compact view enabled S-Drive component will look like the following figure.
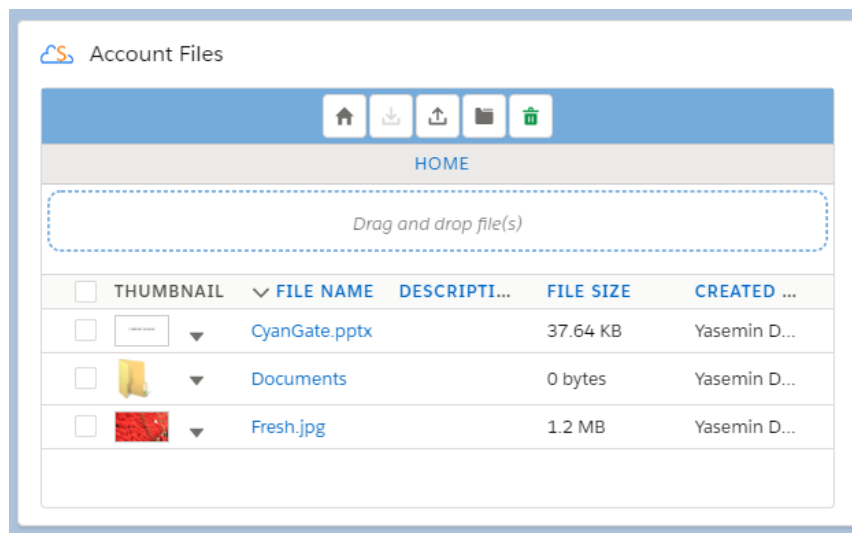
*Figure II-3*

When using Compact View there are limited features in the toolbar. In this view, the available functionalities are the following:

- Navigate to Home
- Upload files
- Download files and folders
- Create folders
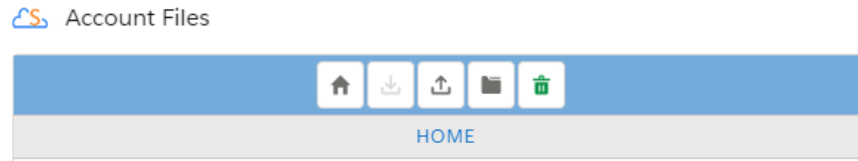- Navigate to the Recycle Bin for displaying the trashed files and folders



Figure II-4

Advanced operations such as search, public share, e-mail, and cut/copy-paste are not enabled in the toolbar of compact view. Please disable "Use Compact View" configuration to enable these features.

Each file in the file list will have these in the following order:

- A checkbox to select the file
- The thumbnail image of the file
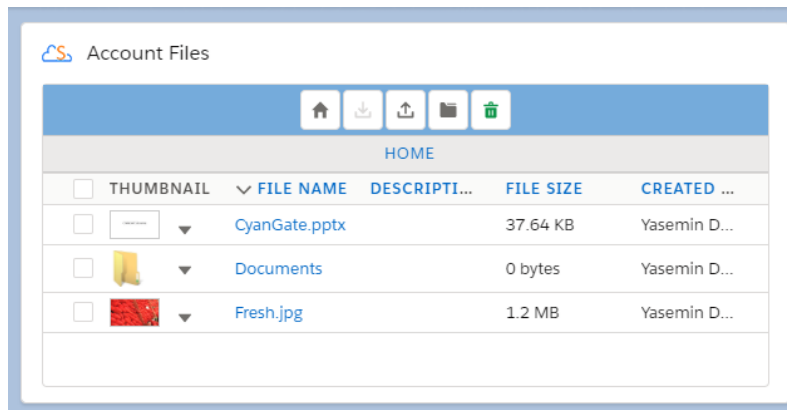- Actions menu button
- File Name
- Configured Fields



Figure II-5

Although the toolbar options are limited for a compact view, users can still use the file actions button to do the following operations:

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- Open
- Download
- Copy URL
- Details
- Edit
- Delete
- Post to Chatter
- Upload New Version
- Previous Versions
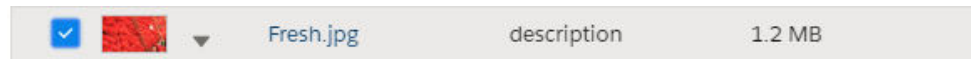
The available actions in the Detail view are:

- Open
- Download
- Copy URL
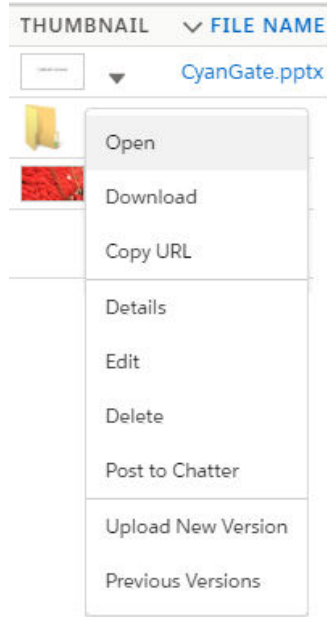- Edit
- Delete
- Upload New Version
- Previous Versions

When navigating to Details view, the users can see all the configured fields and actions on the detail page. "Details", "Chatter", "Audit" tabs are available in this view.
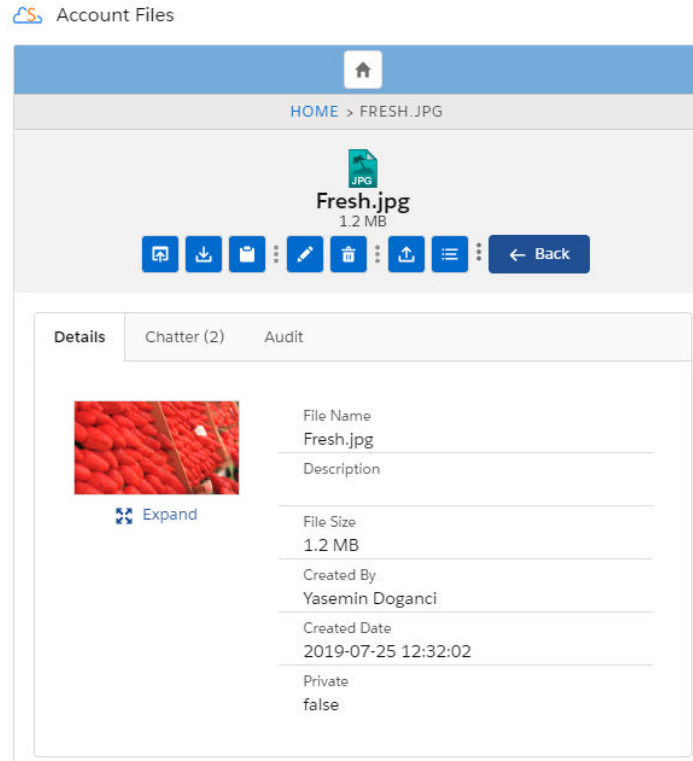
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**Figure II-8**

Note that Folder Tree is not available in the compact view mode.

If there is a pagination configuration for the compact view, the pagination options will show up on the bottom right corner of the component for navigation.
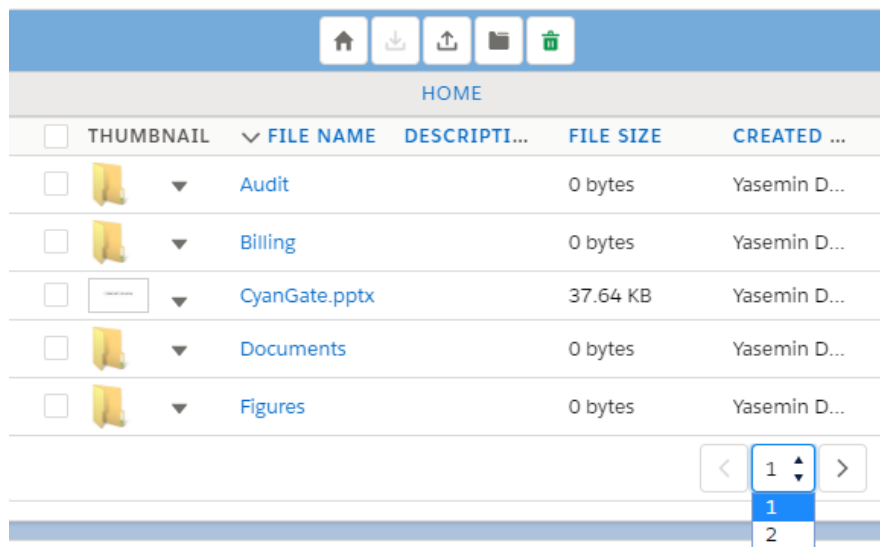


**Figure II-9**

### C.    myDrive Folders

After the installation of S-Drive and clicking on "S-Drive" tab on the Tabs menu, or S-Drive app in App Menu in Lightning Experience, you will navigate to your S-Drive page.

The regular S-Drive page will be opened, and on the right-hand side of the toolbar menu, under the search bar, you will see a toggle button called "myDrive". When you click on this button you will switch into a new page called "myDrive".



**Figure II-10**

myDrive provides a new place to upload your files and create new folders that are only visible to you and no one else in your organization. *myDrive is not available for Communities or Attachments.*

In myDrive, you can upload files, create folders, download or delete files and folders, and perform cut/copy/paste options, search for files in myDrive just as you do in S-Drive.

The main difference of myDrive is that this place is private only to you. Therefore, you will not find any sharing related actions, such as "Share", "E-mail" and "Chatter" in myDrive.
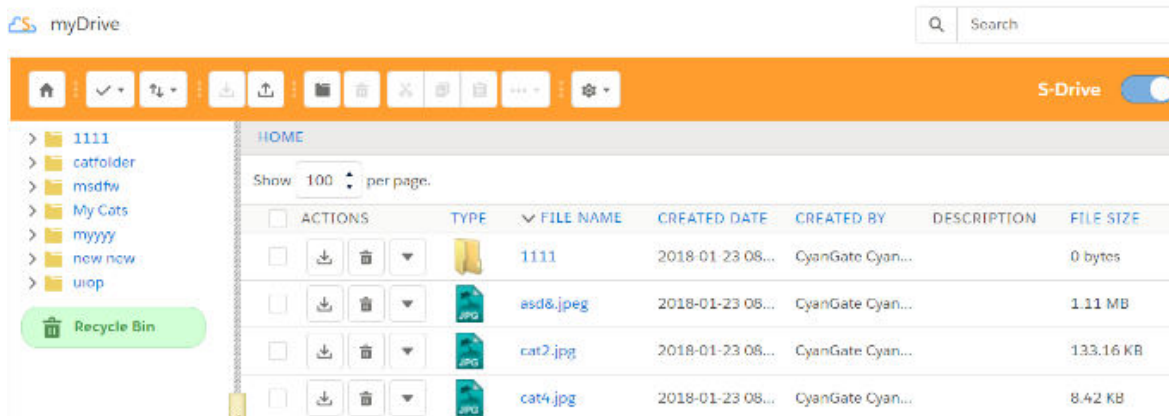


**Figure II-11**

To go back to S-Drive files, you can use the toggle button.

*Note: If your admin changed the settings of 'MyS3Object' in Salesforce's Sharing Settings, your files and folders in myDrive might be visible to others. To make your myDrive private to you, contact your admin to change the sharing settings to "private".*

## D.    View Types

- ### List View

List view is default S-Drive view for all users. There is no any thumbnail or preview image for this view type. The files are listed in a regular order in this view type (Figure 146).

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

**Figure II-12**

**(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.
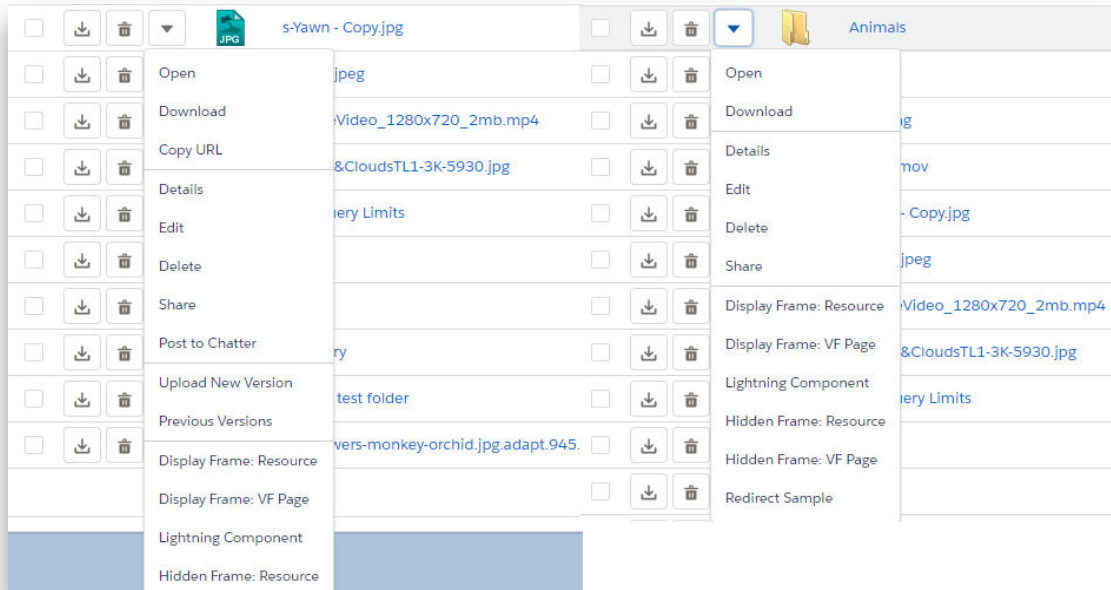
Figure II-13

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

2. **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.

3. **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.

4. **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.

5. **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.

6. **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.

7.  **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.

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

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

10. **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.

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

(3) **"File Type Icon"** column is used to distinguish file types. Folders, text files, image files etc. have different icons. You can sort by file types by clicking the column header (Figure 146).

(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 146).

(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 146).

(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 146).

(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 146).

**(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 146).

- **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.
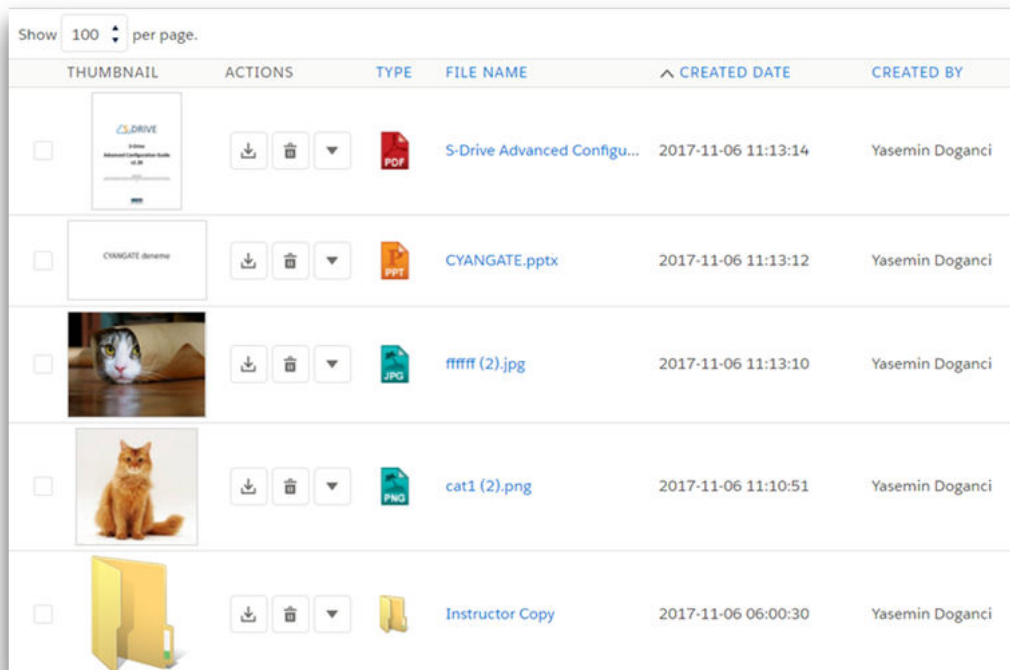


**Figure II-14**

- **Grid View**

On Grid view, each item is listed on grid-card style with same height (Figure 150). To select grid view, Preview & Thumbnail feature should be enabled. In the Grid view, action buttons, menu & selection checkbox are different (Figure 151):

**Figure II-15**

7) **Selection Checkbox:** When mouse hovers over thumbnail image, a checkbox is shown on the top-left side. You can select or deselect item by using this checkbox. (Figure 149-1).

8) **Detail Window:** When hovering thumbnail image there is a glass icon on the center. If you click on image Detail Window is opened. To see more information please check Detail Window section. (Figure 149-2).

9) **Download Button:** You can download file or folder by using this button. (Figure 149-3).

10) **Delete Button:** It deletes file or folder. To see more information, you can see Delete section. (Figure 149-4).

11) **Action Menu Button:** You can access all actions about file or folder to click this down arrow button (Figure 149-5). To get detail information on actions menu please check List View \ Actions section.
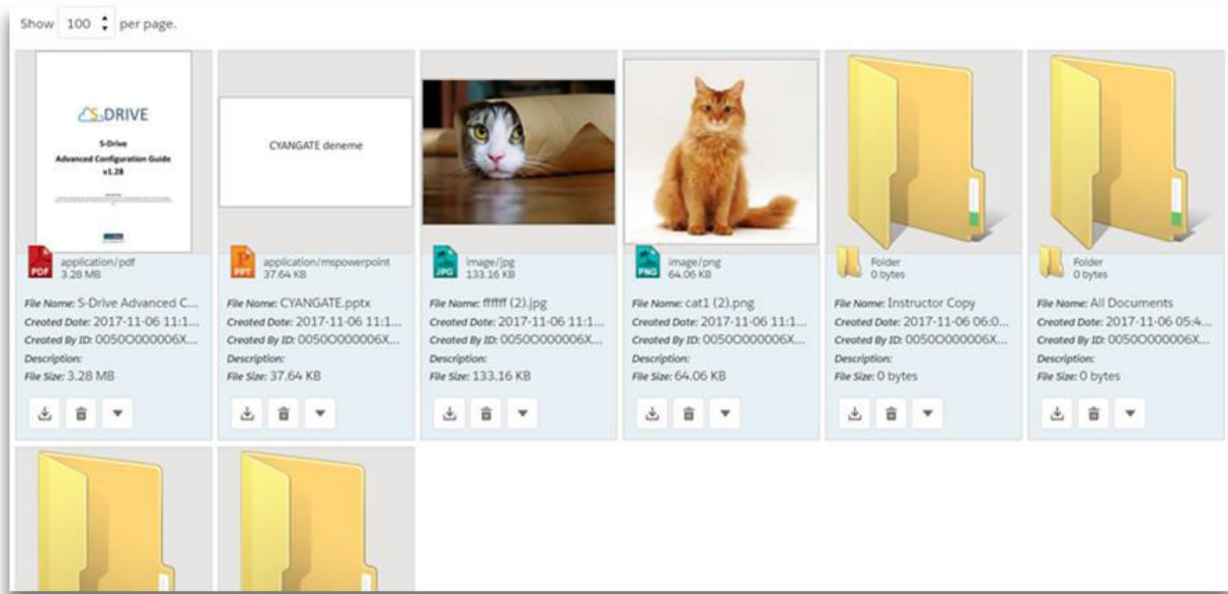
Figure II-16
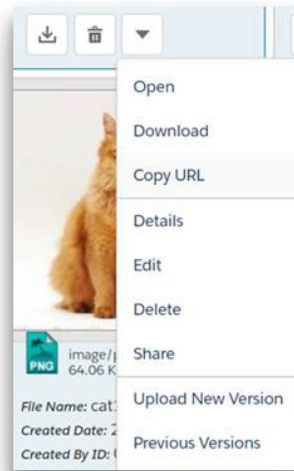


Figure II-17

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**Preview Details Window**

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

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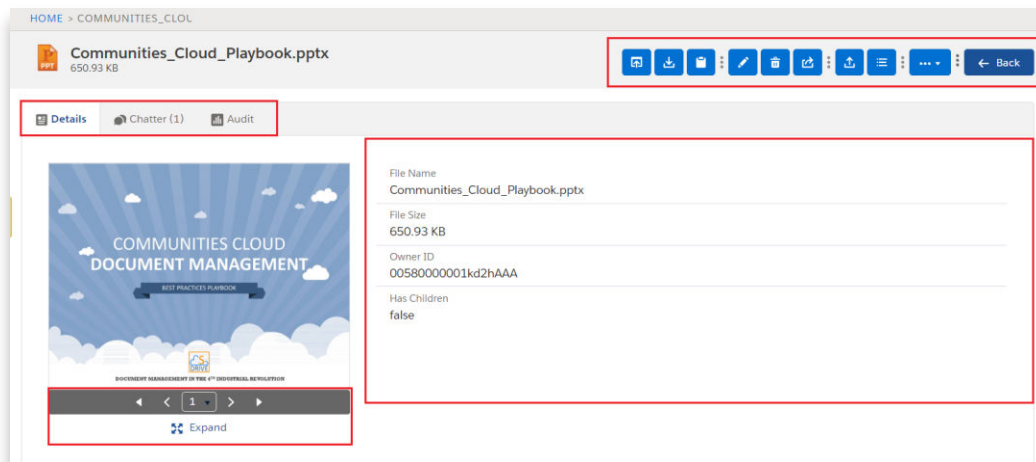


Figure II-18

If your file has multiple pages, the previews of these pages are also displayable in this section. Using the buttons under the preview of the file, it is possible to navigate through all the pages.
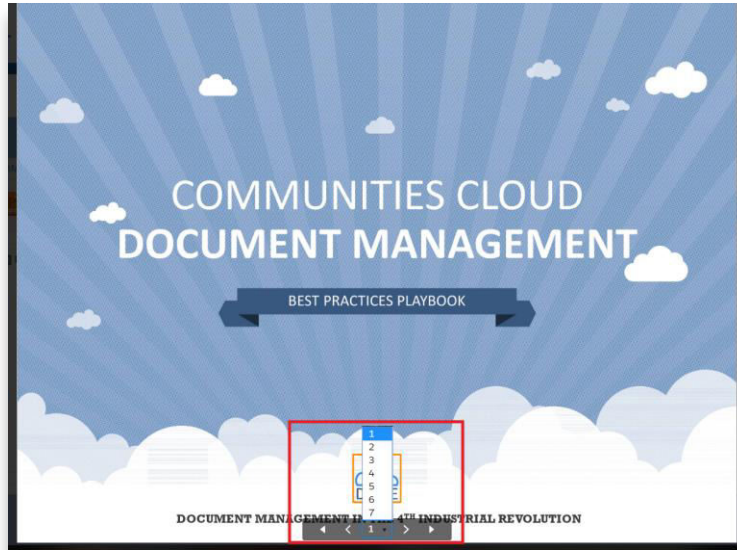
Figure II-19

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

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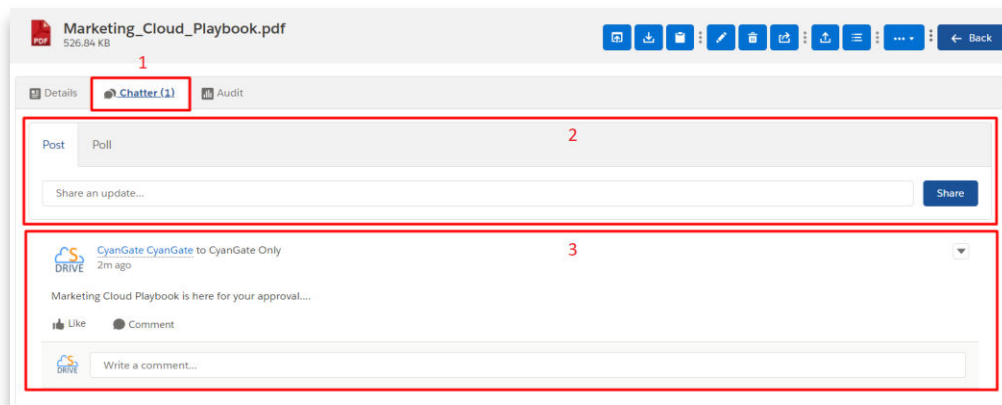


Figure II-20

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

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

Total Hit Count:     0

Figure II-21

## E. Creating Folders

You can create folders by clicking "Create New Folder" button in the toolbar (Figure 136-h). You can create any number of sub-folders in a folder. Go to the folder that you want to create a sub-folder. Click "Create New Folder" button. After clicking the "Create New Folder" button, a new pop-up screen will be opened (Figure 156):

Figure II-22

(6) **"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 156-1).

**(7) "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 156-2).

**(8) "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 156-3). 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.

**(9) "Close Button"**: If you decide not to create a folder, you can click on Close button. Operation will be canceled, and you'll return to the S-Drive Folders screen (Figure 156-4).

**(10)        "Create Button"**: After filling in the required fields, you can click on Create button to create the new folder. S-Drive will create the new folder and refresh the folder structure for you (Figure 156-5).

*Notes*

4.  If you try to create a folder without a name, with forbidden characters, or with a name that exists in the current folder you'll get one of the warning messages below:
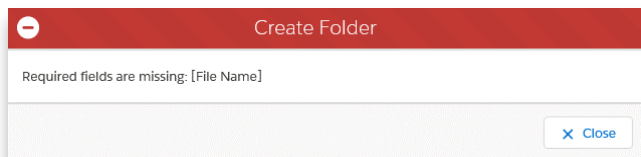


- *'Required fields are missing [File Name]'*.
- *You are attempting to create a folder that has the same name with an existing folder! You may not have access to the existing folder because of sharing rules.'*.
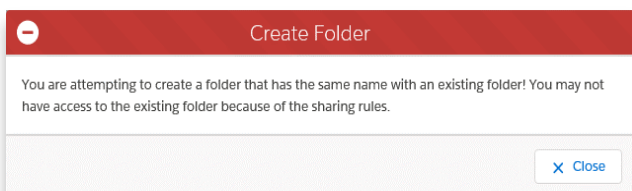
Click OK and then specify a new name to the folder.

5.  "**Create Folder**" button becomes invisible if you do not have permissions to create a folder.

6.  "**Create Folder**" button becomes invisible for the "**Search Results View**" once a search operation is performed. So, you cannot create a folder in the search results screen. You need to click "**Home**" button and go to the folder where you want to create the subfolder.

### F. Uploading Files

#### a. Uploading with Buttons

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 136-e). You can upload any number of files into a folder at a time. Go to the folder that you want to upload files. Click "Upload File(s)" button. After clicking the "Upload File(s)" button, a new pop-up screen will be opened as shown in Figure 157.
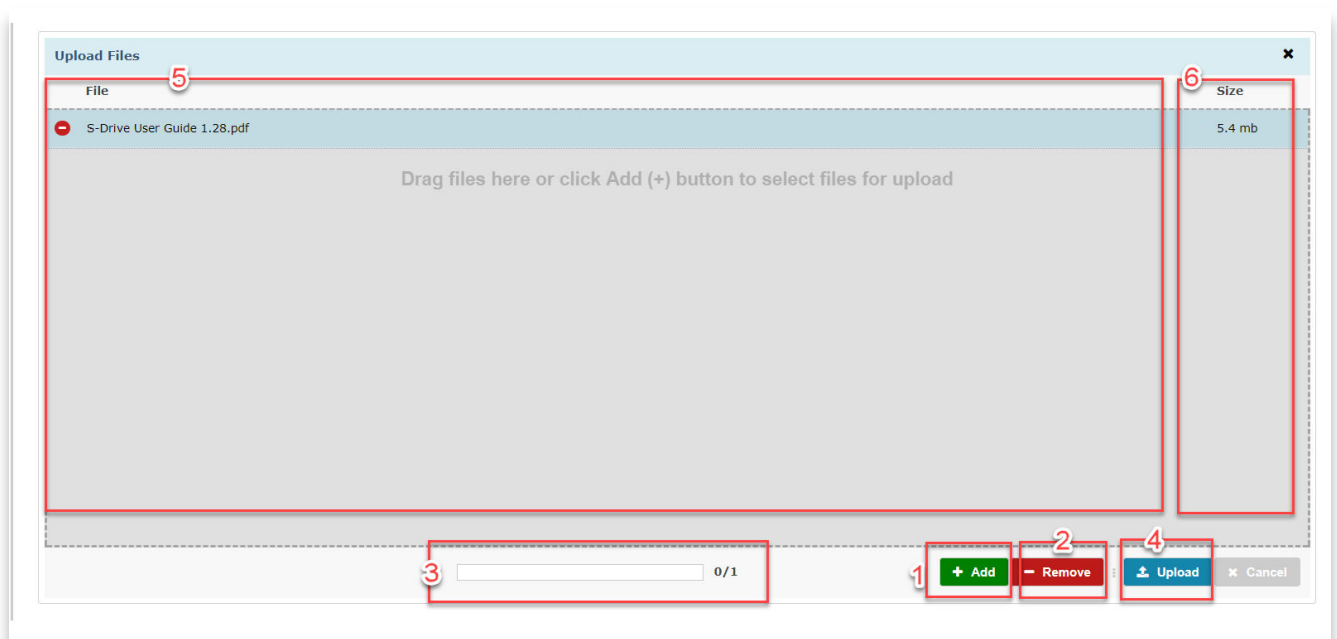


**Figure II-23**

(8) **"+ Add" File(s) Button**: You can add files to the upload list by using this button. After clicking the (+) sign, "Select file(s)" screen will be opened. You can browse your computer and select files to upload. To select multiple files at a time from a folder, click on each file while you are holding "Ctrl" key. After selecting files to upload, click "Open" button. Selected files will be added to the Upload Files screen. Note that selected files are not uploaded yet, you are just creating an upload list. You can use "Add file(s)" and "Remove file(s)" buttons multiple times to organize the upload list.

(9) **"- 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.

**(10)** **"Upload Progress Bar"**: This progress bar displays the upload information after clicking the "Upload file(s) Button". For Html Upload Widget, percentage of the progress (i.e. 49%) and the uploaded files count of total files count (i.e. 1/2) is displayed in the upload progress bar. If upload is completed successfully, it displays *"Upload(s) completed successfully"* message inside the progress bar. You can cancel the upload at any time by clicking the "Cancel Upload" button. (Note: Cancel Upload button is just visible while upload is in progress.
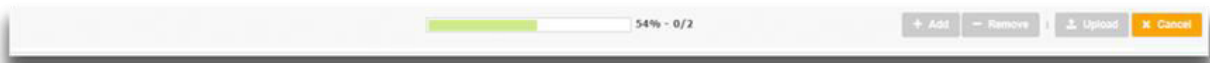


*Figure II-24*

**(11)** **"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.

**(12)** **"File Column"**: This column displays the names of the files to be uploaded. (Figure 157-5)

**(13)** **"Size Column"**: This column displays the sizes of the files to be uploaded. (Figure 157-6)

*Notes*

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

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

*Done* and *Failed.*

- 🔴 *Queued*: Current file in the list is queued for upload. User can remove this file clicking this delete button.

- 🔵 *Uploading*: current file in the list is being uploaded to the S-Drive.

- ⚪ *Multipart Processing*: current file in the list is processing for multipart operations like copy part, complete multi part. This may take long time.

- ✅ *Done*: current file in the list is successfully uploaded to the S-Drive.

- 🟡 *Failed*: current file is failed to upload. This may happen because of a system problem or user canceled the upload operation or also if you select "No" for the "Overwrite file?" question.

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

2. **"Close Button"**: This button is used to close Upload Screen. It is not enabled while upload is in progress. If you want to close the upload screen while an upload is in progress, first you need to cancel the upload.

![Notes icon]*Notes*

1. If you try to upload a file with a name that exists in that folder, you'll get a warning message saying, "Do you want to overwrite the file?" There are four possible answers: *Yes, No, Yes to All and No to All* (Figure 160). You may get this message multiple times for multi-file uploads for each file that has the same name of a file or folder in the uploaded folder.
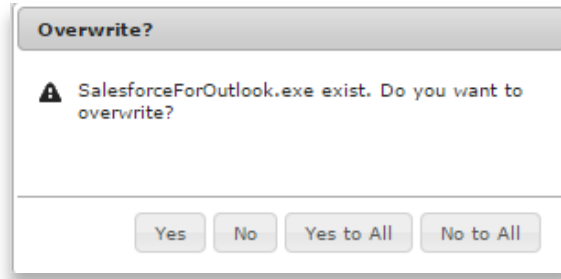
**Figure II-26**

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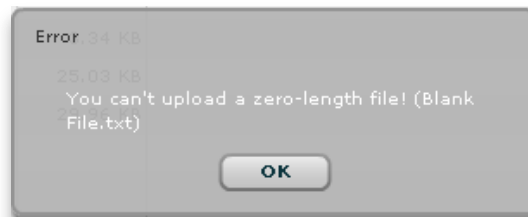


**Figure II-27**

3. After processing the upload list, you'll be informed by saying *"Upload(s) completed successfully"* if list is processed without any errors (Figure 162). After clicking OK button, upload screen will be closed, and the current folder will be refreshed.
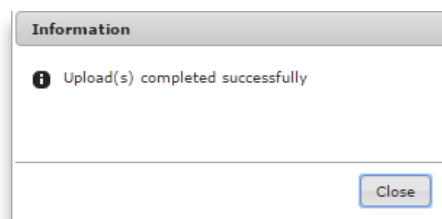


**Figure II-28**

4. "**Upload File(s)**" button becomes invisible if you do not have permissions to upload file(s).

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

### b. Uploading Files with Drag and Drop

You can also upload files with by dragging and dropping from the desktop or your file explorer to S-Drive on your browser. Select and drag your files from your local interface and drag it to anywhere on the S-Drive component. It will turn blue and you can drop it.
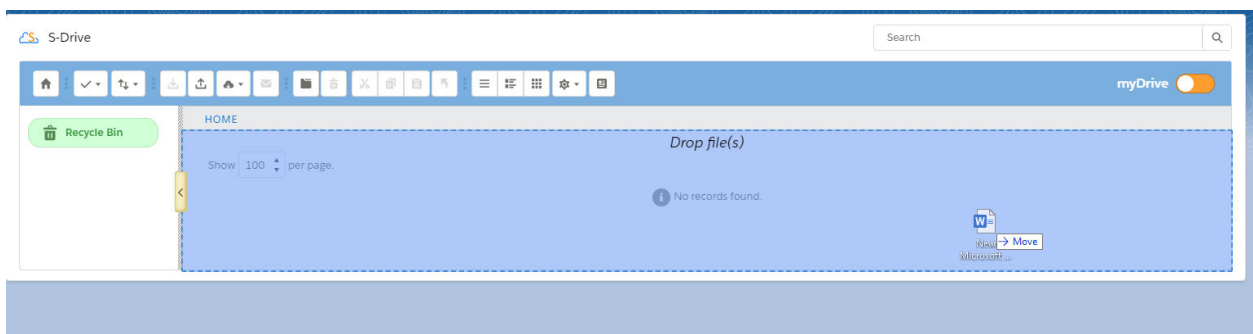


Figure II-29

Once you drop the file or files, the Upload panel will open as shown below. If the File Object has a required field, you will have to fill them in. Then click the upload button. Once uploaded, click on continue to finish.
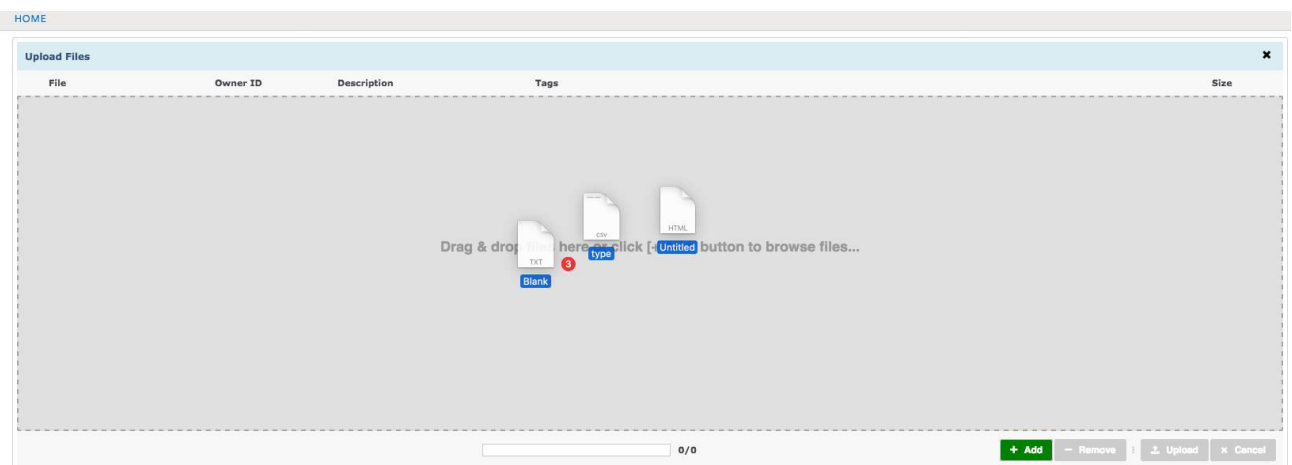


Figure II-30

## G.    Tagging

Tagging is a feature coming with 2.5 release and it is available for Salesforce Classic and Lightning Experience. You can both add tags to your S-Drive files and delete the existing tags. Tags are also searchable here. By clicking on the tags, you can find files that have the same tags with the clicked one.

If you don't see Tags, refer to **Admin Guide 2.5 – 3.2.1. S-Drive Configuration Tab Section H** to learn how to configure it.

- ### Adding Tags

In order to add tags to a file, go to *Details* of the file for the Lightning Experience.



<div align="center">
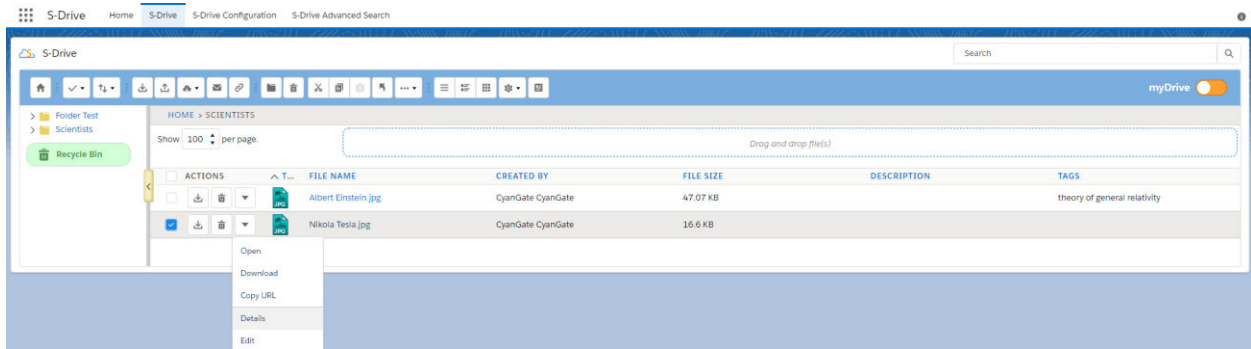
**Figure II-31**

</div>

After going to *Details*, click the *Edit* button in the *Detail* section to add tags.



<div align="center">
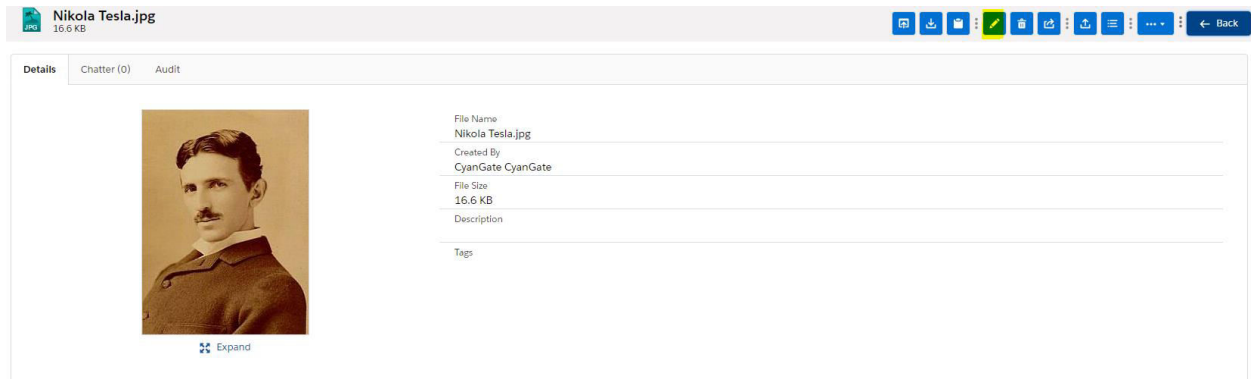
**Figure II-32**

</div>

Then you will see this edit section. You can either add single tag or multiple tags by separating them with a comma. After adding the tags, press *Enter* to see them.
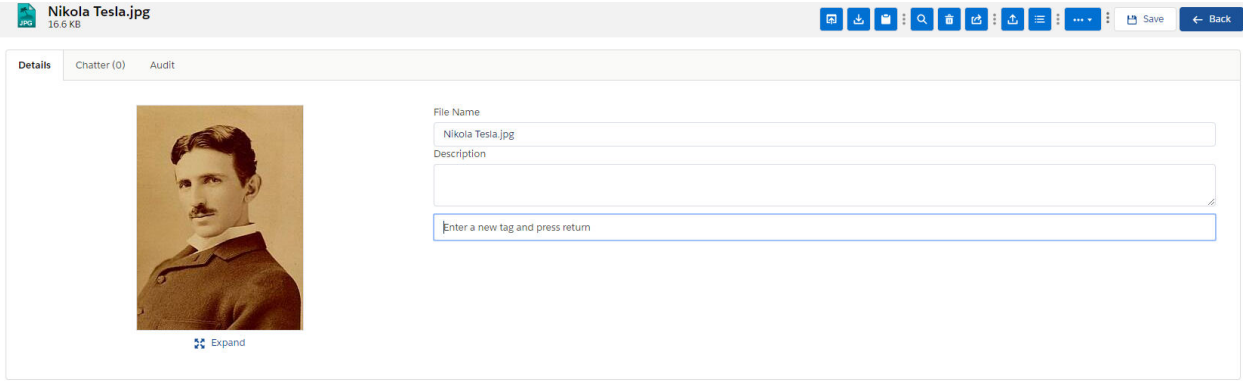
**Figure II-33**

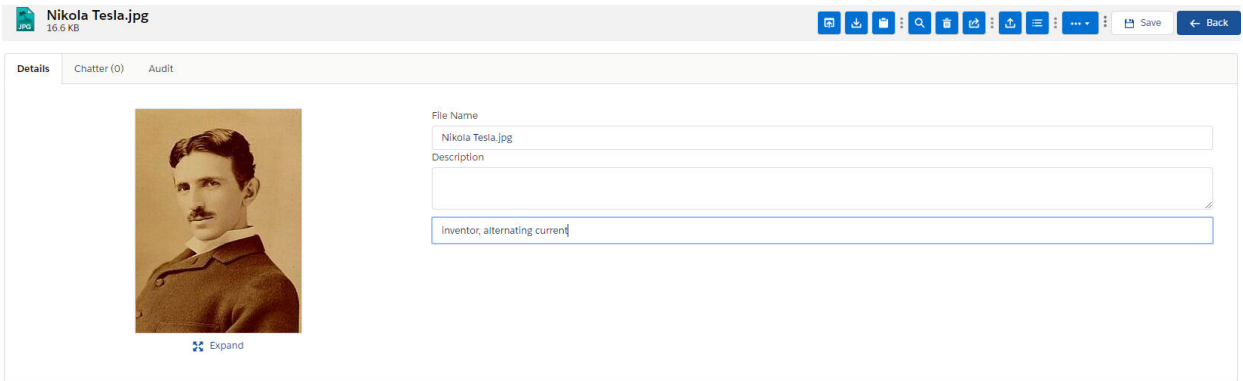After entering two tags and clicking the enter button, tags will be added.



**Figure II-34**

After tags are added, click the *Save* button to save the tags.
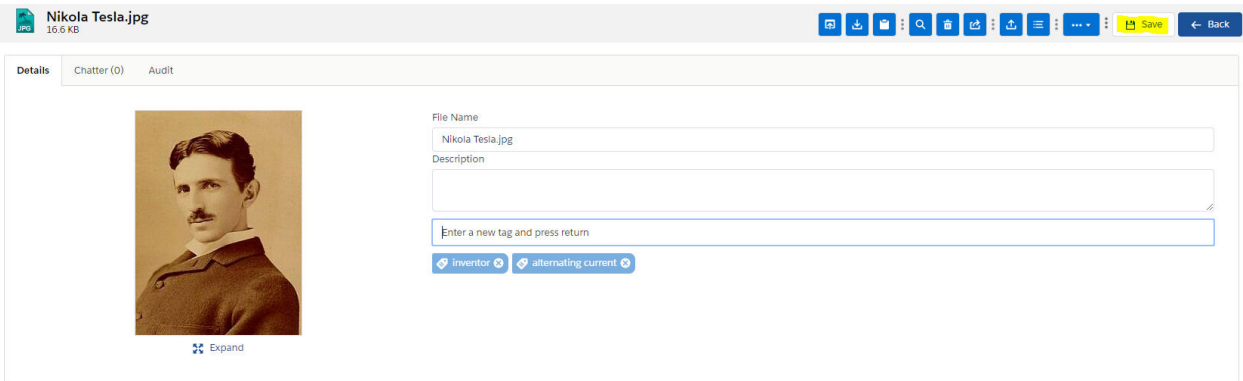


**Figure II-35**

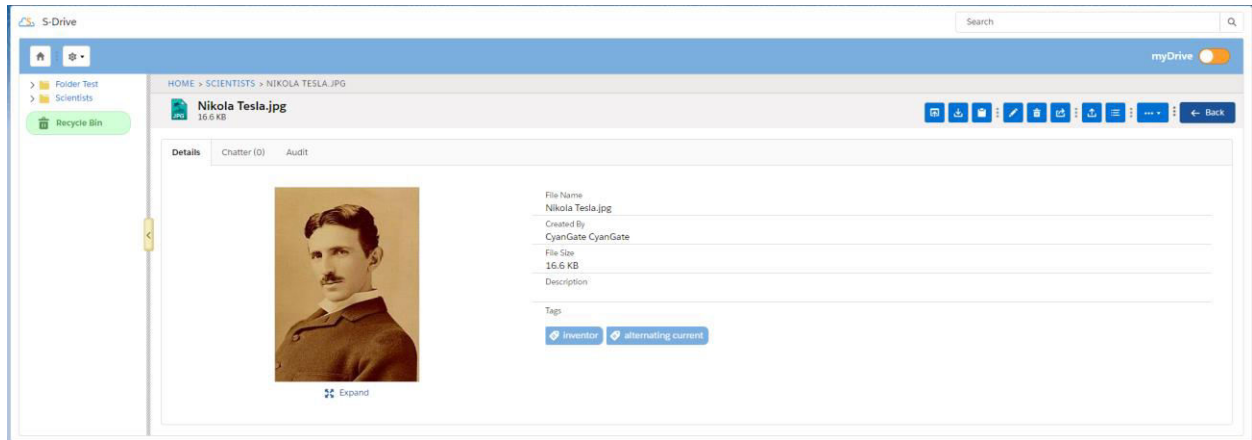After saving the tags, the final look will be like below.

Figure II-36

- **Removing Tags**

If you want to delete the tags from the files, go to *Details*/*Edit* section again. Click X button, then click *Save* button.
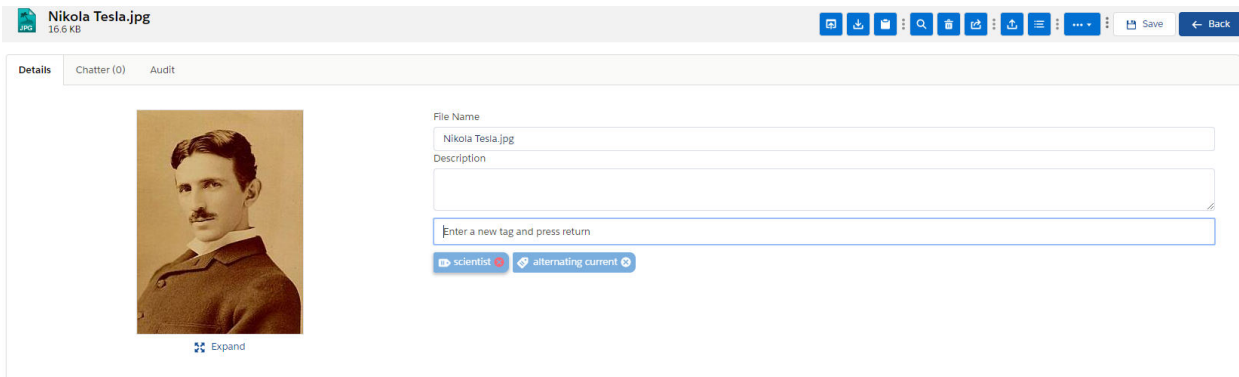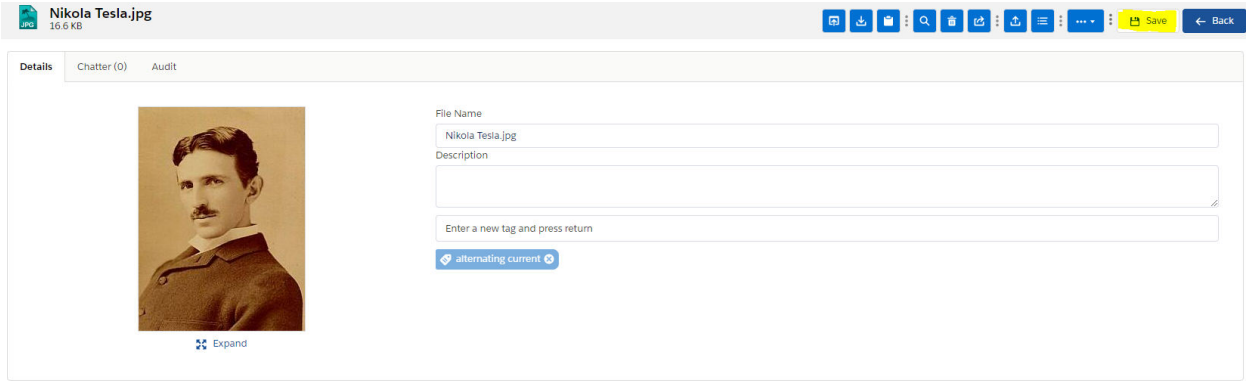


Figure II-37

All Rights Reserved - CyanGate LLC

**Figure II-38**

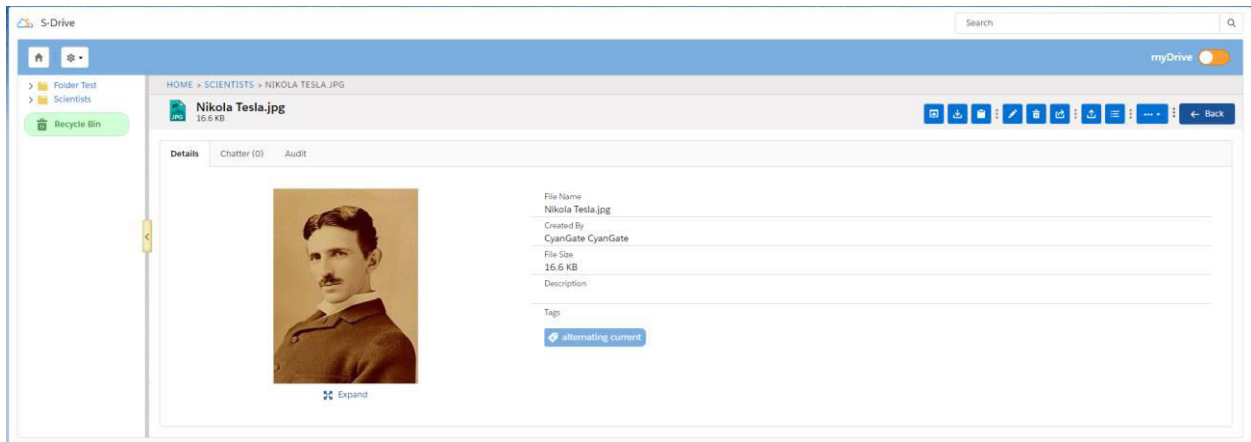Then the final look will look like below.



**Figure II-39**

- ### Searching Files with Tags

Like in the Salesforce Classic, you can search and find files across S-Drive that have the same tags with the clicked one. Click the tag in the *Detail* section of the file.
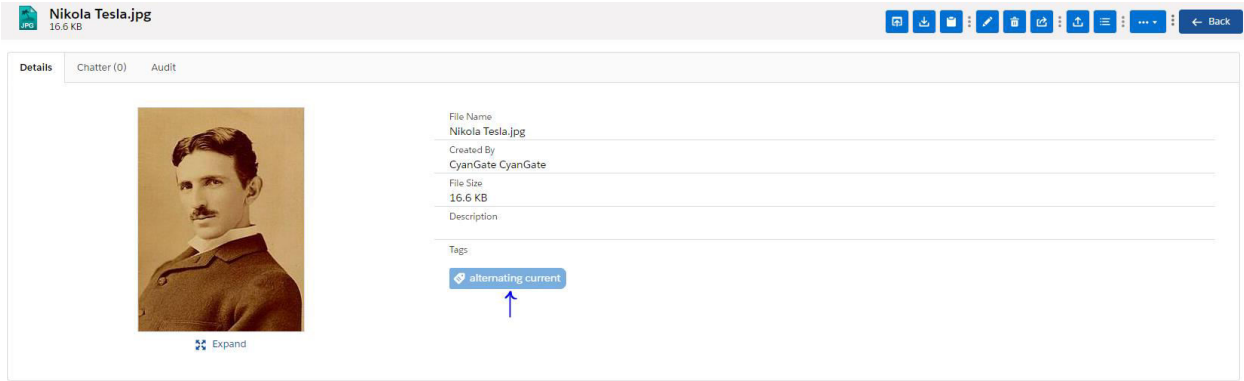
All Rights Reserved - CyanGate LLC

**Figure II-40**

You can see the result as below. Right now, there is only one file that has the *alternating current* tag.
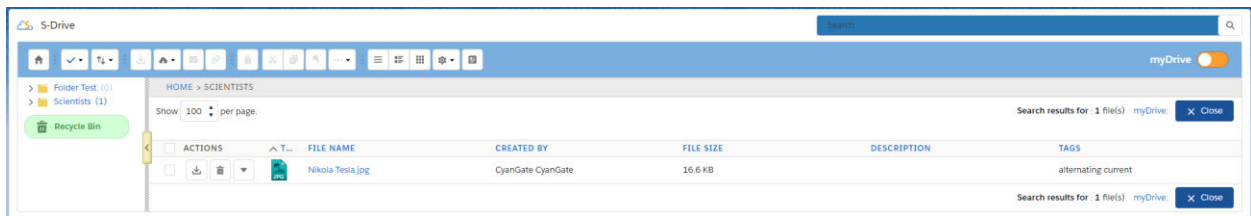


**Figure II-41**

## H. Importing External Files

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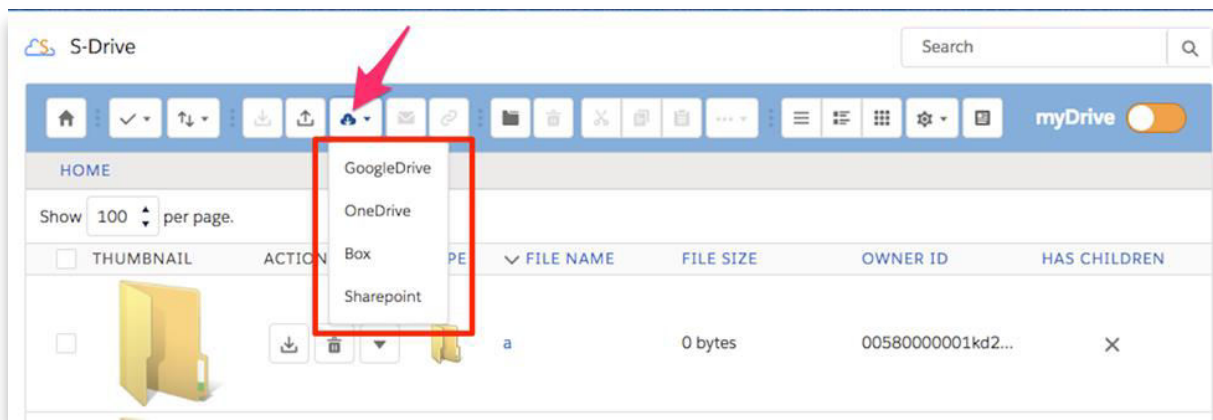


**Figure II-42**

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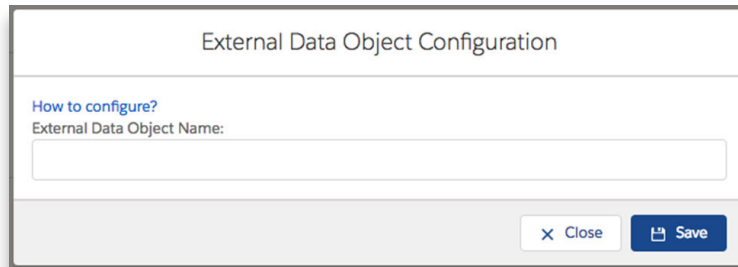


**Figure II-43**

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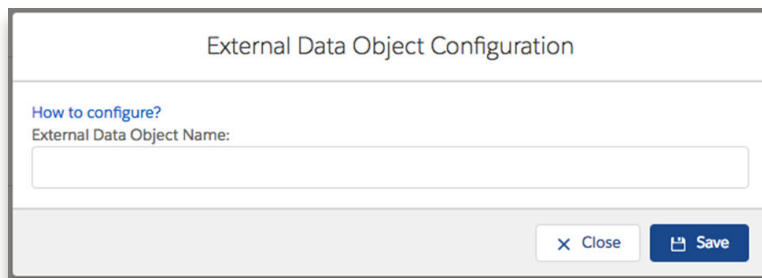


**Figure II-44**

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

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

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

## I.        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.

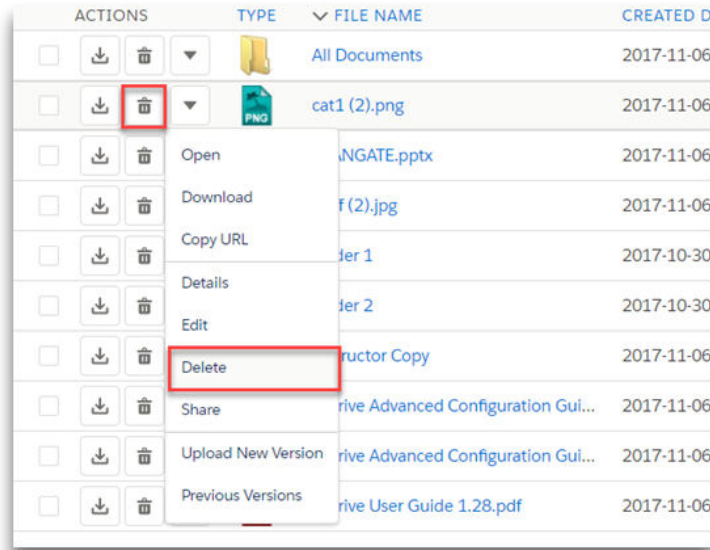All Rights Reserved - CyanGate LLC

- **Single File Deletion**



**Figure II-45**

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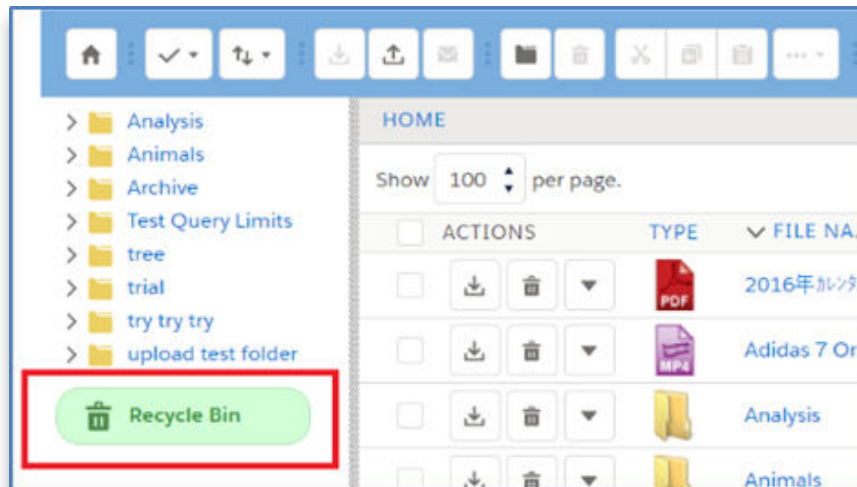


**Figure II-46**

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 181).
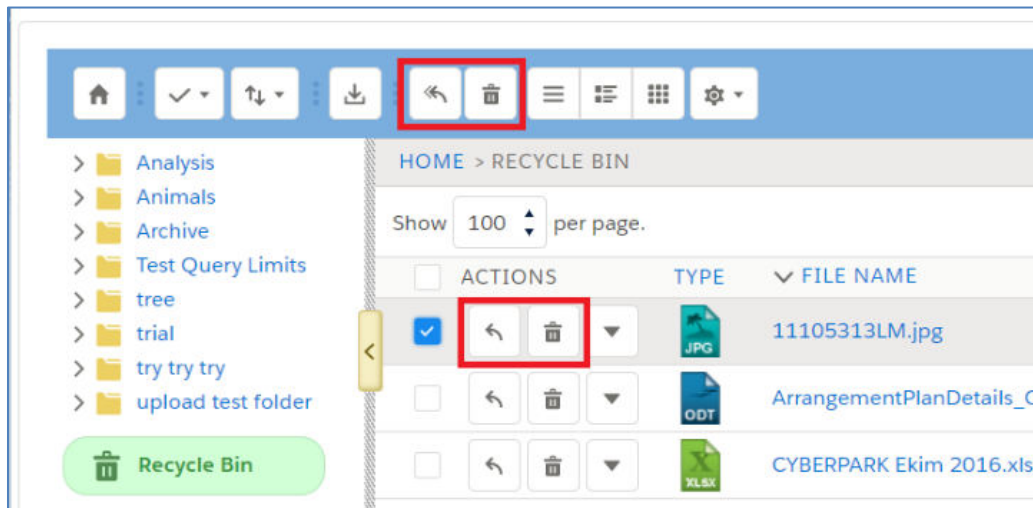


**Figure II-47**

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

If you decide to delete the files, you can click on the "Delete File" item action or the "Delete" button on the Toolbar. After clicking the "Delete File" item action menu you'll be asked if you are sure (Figure 182).
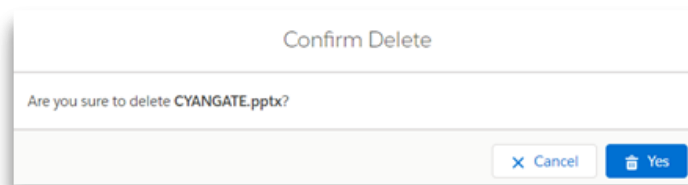


**Figure II-48**

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

*Notes*

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.
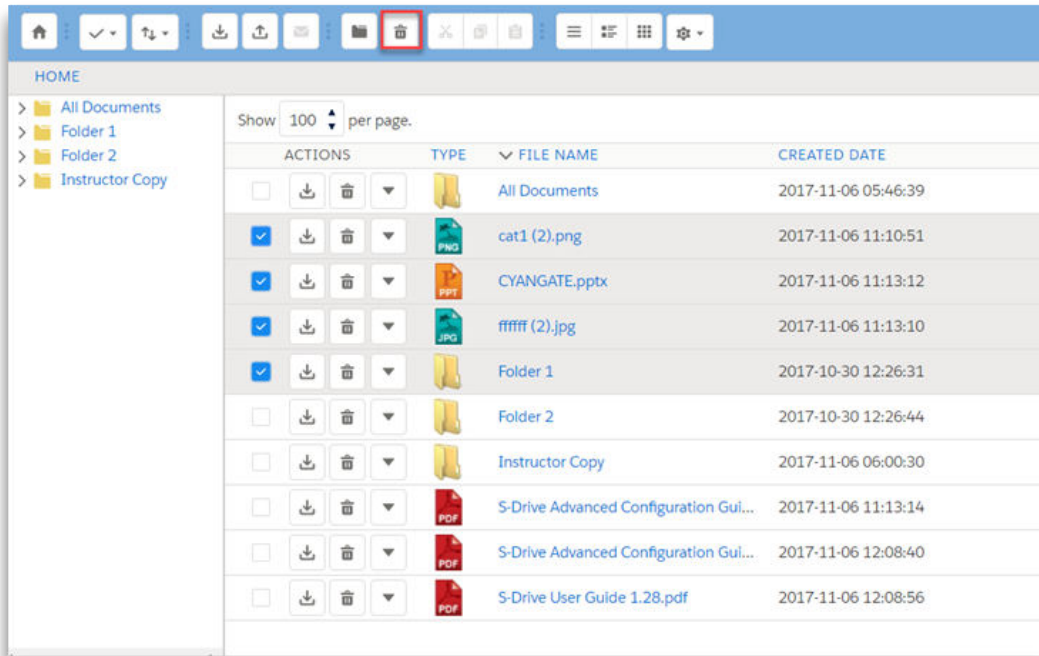
- **Multiple File Deletion**



Figure II-49

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. The files you have chosen to delete will immediately go to the Recycle Bin. In Recycle Bin you can choose to delete the files permanently or restore them.  You can access recycled files/folders by clicking on the "Recycle Bin" button which is at the bottom of the Folder's Tree.
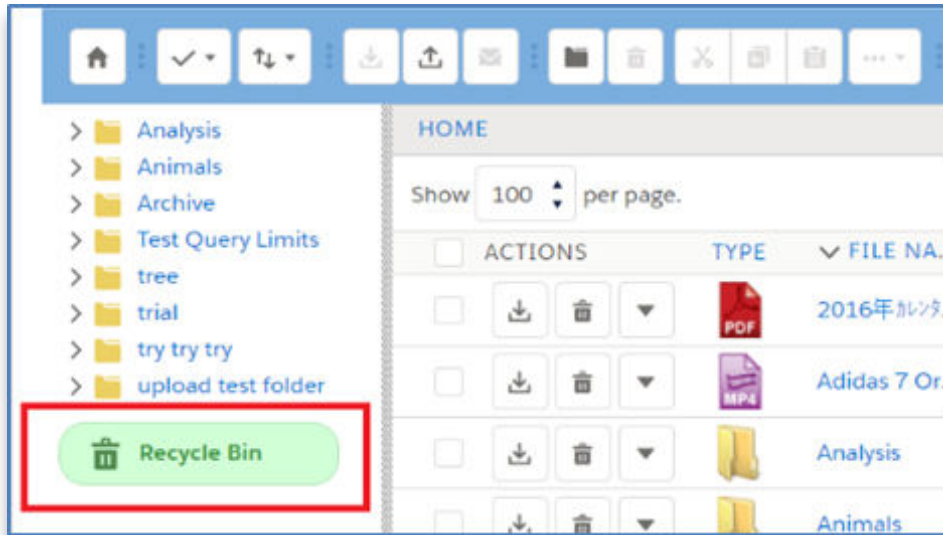
Figure II-50

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 185).
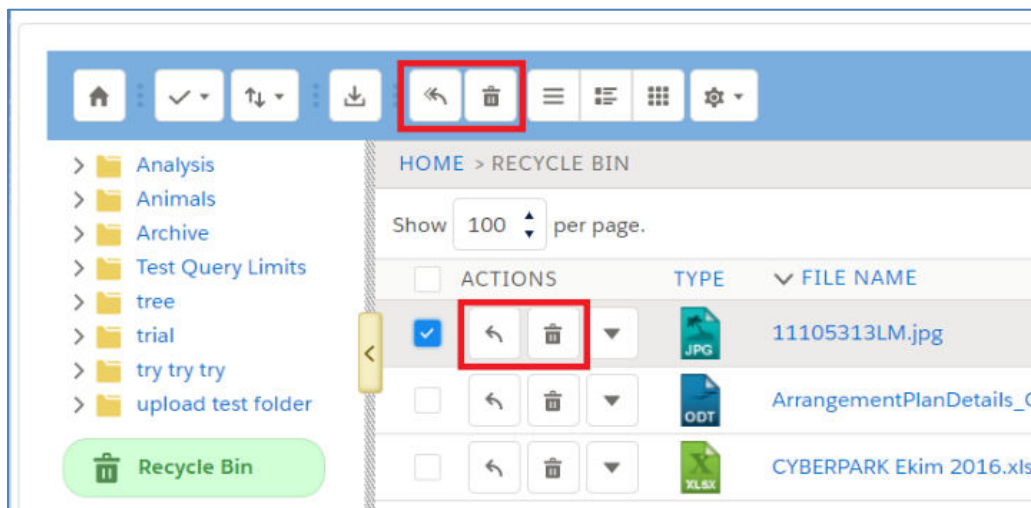


Figure II-51

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

Using this method, you can delete multiple files at a time. After clicking the "Delete File(s)" button you'll be asked if you are sure. Select "Yes" to delete selected files, "Cancel" to cancel delete operation.

**Notes**

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

## J.    Deleting Folders

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

**Notes**

1. If you try to delete another user's file or folder, you may get an error message: "You don't have enough permission to delete this file!" (Figure 186) 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.
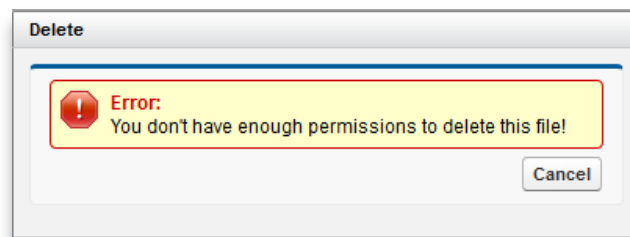


Figure II-52

**Notes on File Recovery**

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

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

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

## K.     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. 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 (Figure 187). Email screen will be opened.
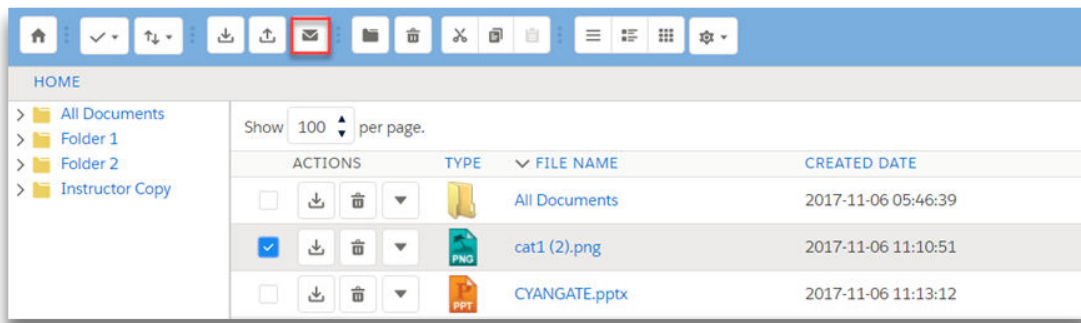


**Figure II-53**

Email Files screen contains many features (Figure 188). Let's review the details of the fields in this screen:
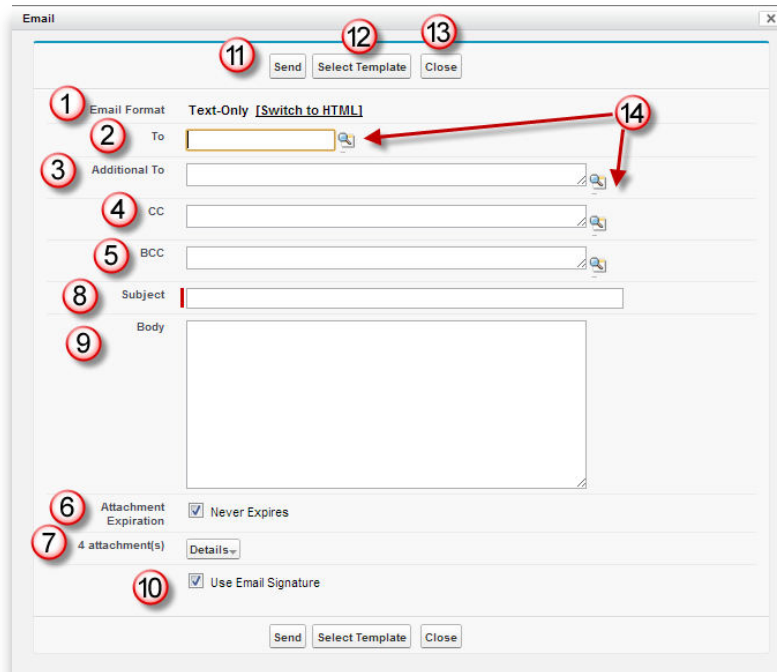
Figure II-54

**(14)**      **"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 188-12).

**(15)**      **"To...":** The main recipient of the email (Figure 188-2). This field must 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 188-14) 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 189). 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 Admin Guide* for enabling Activity History for standard and custom objects.
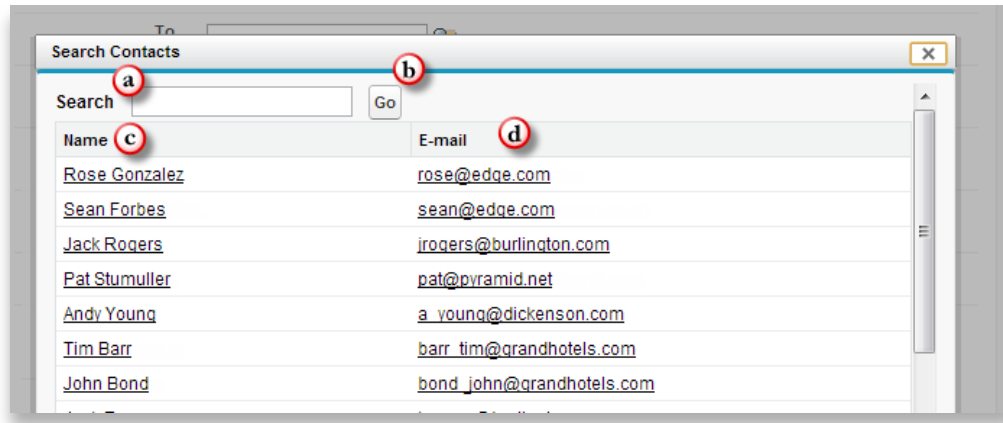
Figure II-55

*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 Admin Guide – Creating Custom Object Files" section.

(f) **"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 your contacts (Figure 189-a).

(g) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 189-b).

(h) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 189-c).

(i) **"Email Column"**: Results' emails will be displayed in this column (Figure 189-d).

(16)     **"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 44-14) to select recipients from Salesforce contacts (Figure 188-3). "Lookup" button is not available for Customer Portal users.

(17)     **"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 188-14) to select recipients from Salesforce contacts (Figure 188-4). "Lookup" button is not available for Customer Portal users.

**(18)**      **"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 44-14) to select recipients from Salesforce contacts (Figure 188-5). "Lookup" button is not available for Customer Portal users.

**(19)**      **"Attachment Expiration"**: This field is used to set the expiration time for the attached files (Figure 188-6). 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 190). 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 II-56

**(c)** **"Number Field"**: Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 190-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.

**(d)** **"Time Type"**: You can select *minute(s), hour(s), day(s), month(s) or year(s)* for this field (Figure 190-b).

**(20)**      **"Attachment Details"**: This section gives information about attached files (Figure 190-7). 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 191).
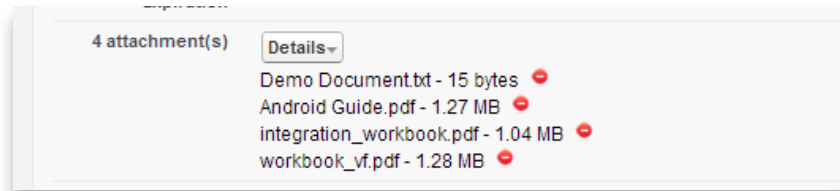
Figure II-57

**(21)** **"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 188-8).

**(22)** **"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 188-9).

**(23) "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 188-10). "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**".

**(24) "Send Button"**: To send your message, click Send button (Figure 188--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.
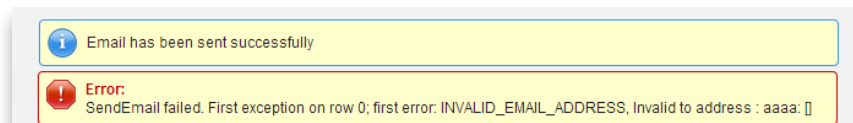


Figure II-58

**(25) "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 49). 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.
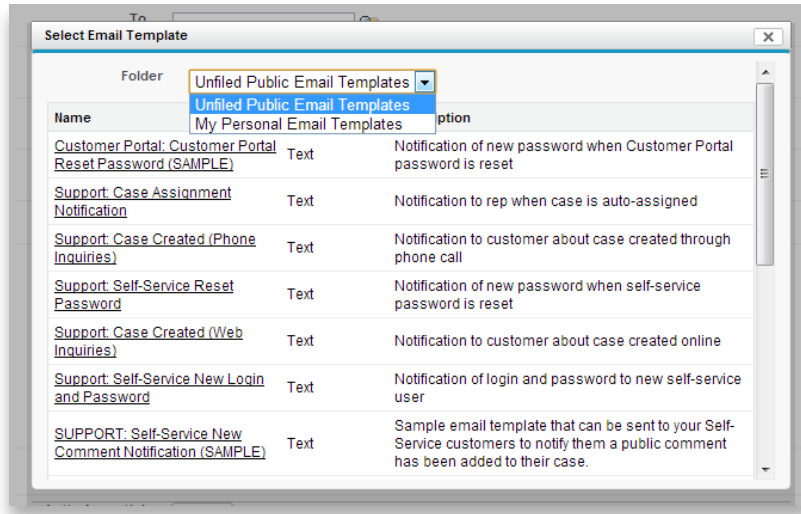
Figure II-59

(26) **"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 188-13).


*Notes*

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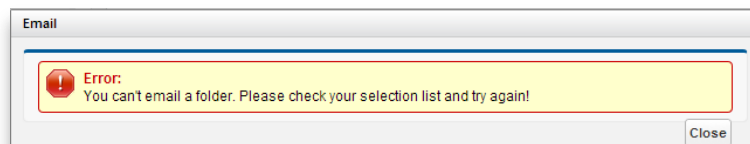


Figure II-60

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

## L.     S-Drive Email (Beta)

The Email Lightning component allows users to write emails with attachments of files from S-Drive.

Please refer to Admin Guide 2.5 to learn how to enable S-Drive Email.

- ### Write an email

Fill the email field with proper email addresses, to send to multiple contacts separate the email addresses by commas, write an email body and format it by using the toolbar at the top of the email body text area. The body and the subject can be left blank.
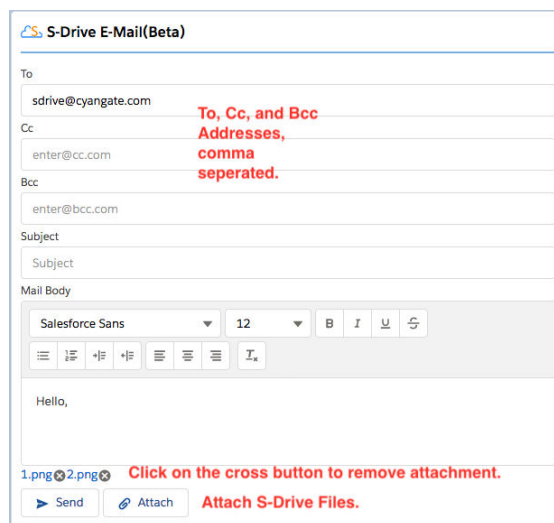


*Figure II-61*

- ### Attach Files

Click on "Attach button" to open the file selector pop up. First choose the object type you want to attach files from. If you chose "S-Drive Tab" you may choose your files to attach, otherwise select the file object type and finally choose the record the files you want to attach are located using the search box. S-Drive in compact view should now show up. Use the selection box to choose your files to attach and then chick on the attach icon in the toolbar at the top. When you are done click on the "Attach" button at the bottom. If you wish to not attach any files click "Close".
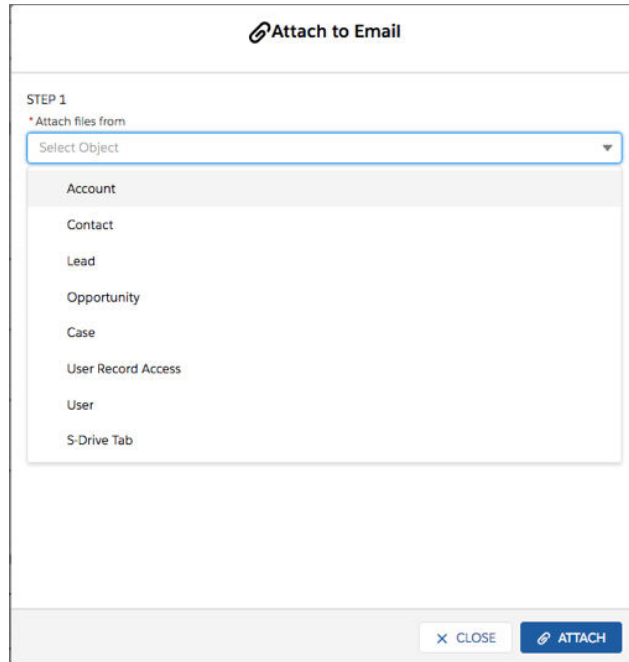
Figure II-62
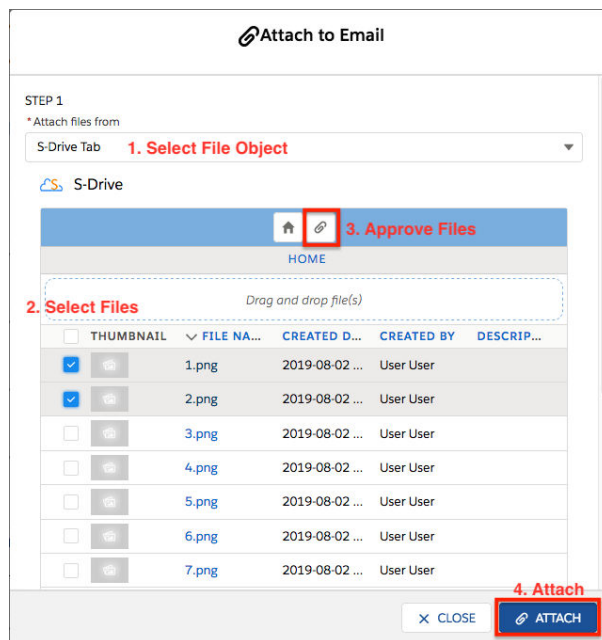


Figure II-63

- **Send the mail**

Click "Send" at the bottom of the email editor, the user will be prompted with an email success message. If object and field level security disables users to insert or update any of the fields of the Email

Message object, users will be prompted with the following error message. To Keep track of emails sent enable users to edit fields in the EmailMessage object.

- ### View Emails from Activities

If you want to see emails sent from your Activities panel in a record first activate Salesforce Enhanced Email. Go to Setup > Enhanced Email > Enable. When Enhanced Email is enabled you will be able to see emails sent in the activity history.
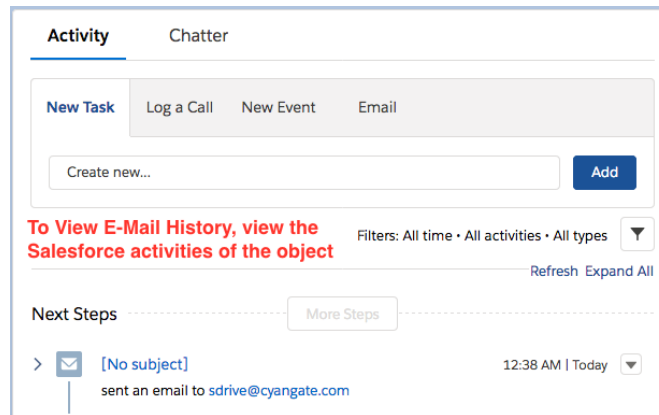


Figure II-64

- ### Changing your email footer

To have a custom email footer go to S-Drive Configuration > General Settings > Mail Settings > Custom Email Footer.

### M. Post Files to Chatter

You can make comments on different files you have on your S-Drive files. For this purpose, you can use the "Post to Chatter" functionality. Click on Item Actions Menu of a file and click on "Post to Chatter" (Figure 199).
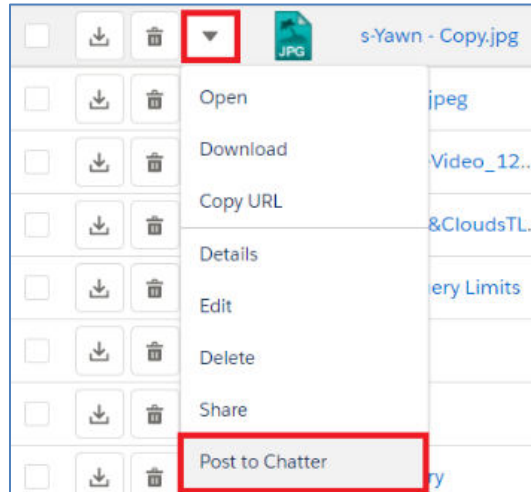


**Figure II-65**

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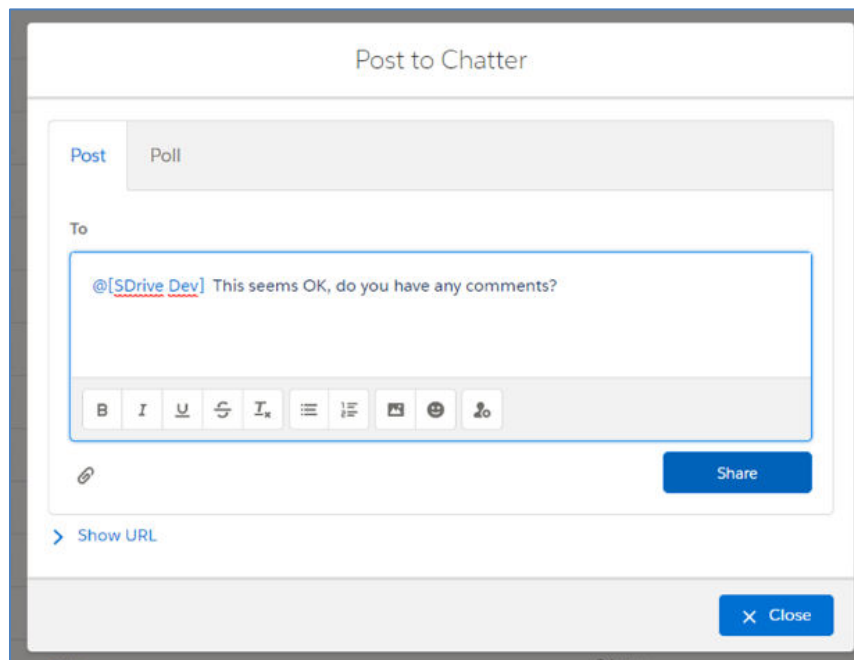


**Figure II-66**

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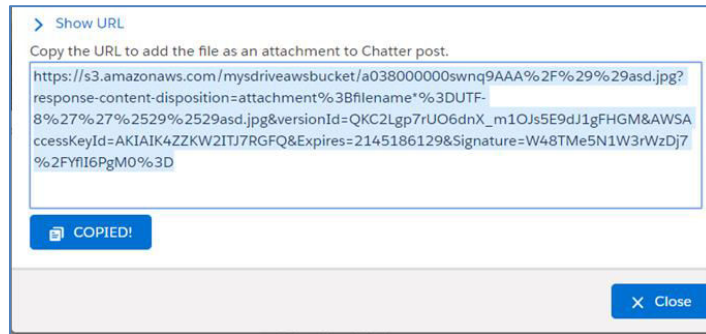


Figure II-67

You can reach the Chatter posts about the file from the "Detail" page of the file, by clicking on the "Chatter" tab (Figure 202-1). In this page you can also share posts (Figure 202-2).
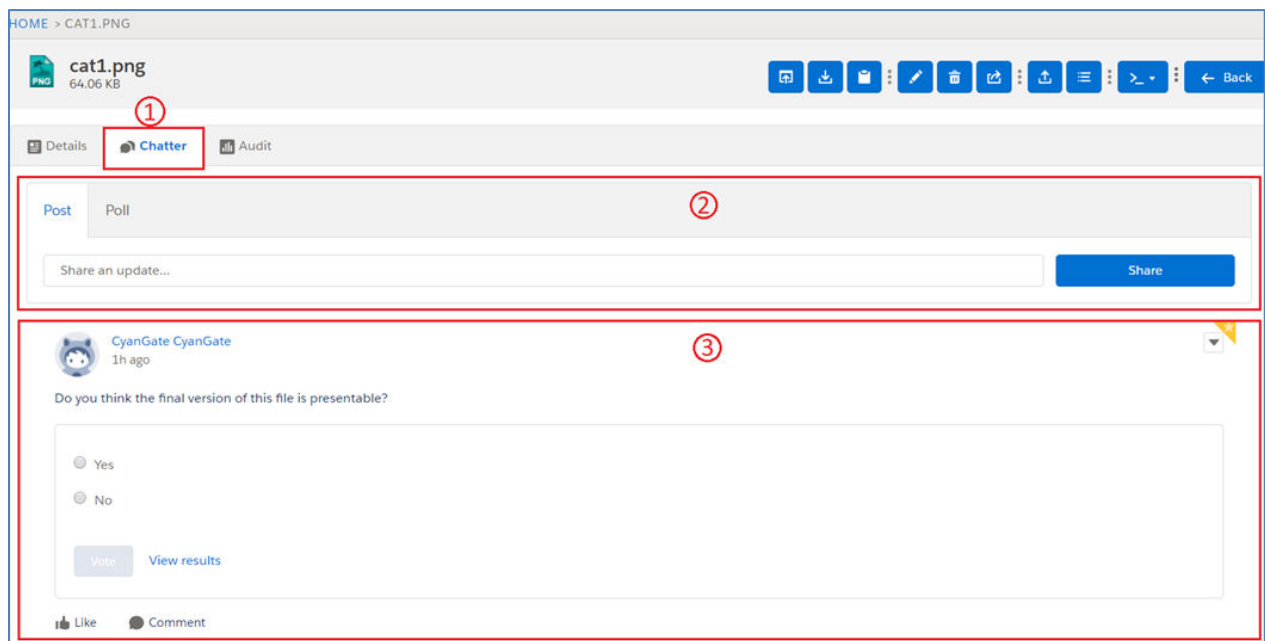


Figure II-68

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

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

3. Here you can reach the chatter feed. Posts which are made about the specific file will be displayed in this section.
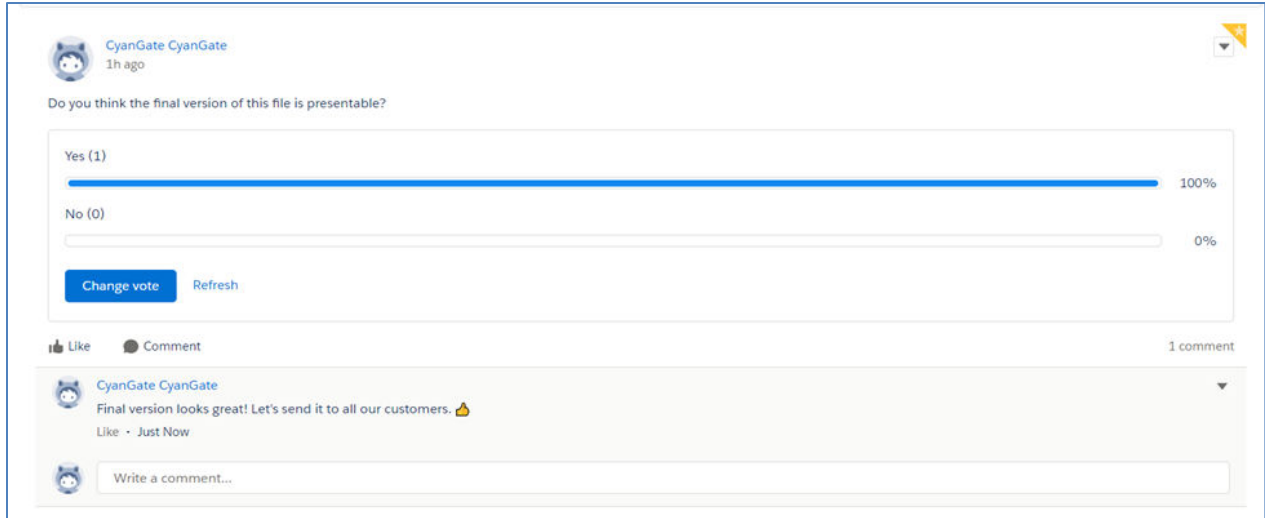
Figure II-69

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

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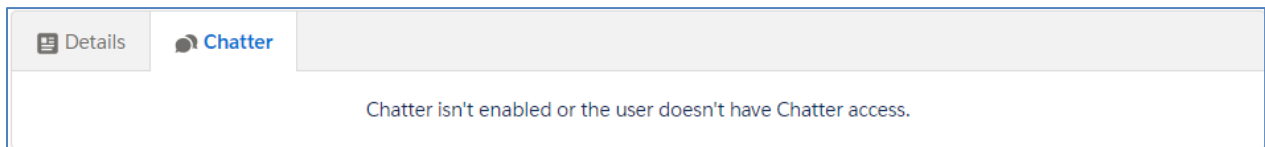


Figure II-70

## N.    Downloading Files

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

- **One File Download**
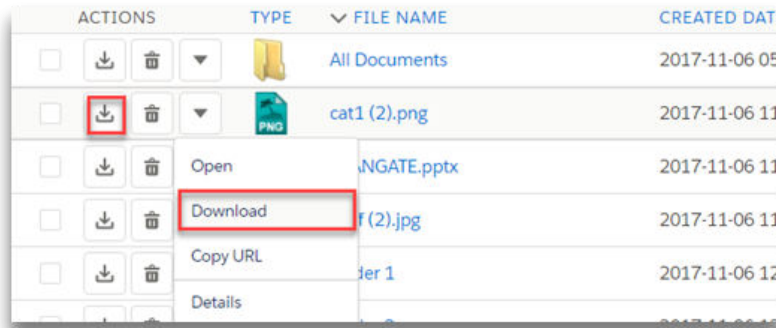
**Figure II-71**

You can download individual files by clicking **"Download"** item menu action and download shortcut button from the "**Item Actions**" button (Figure 205). If "Download" item menu action is selected for file item, download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) If you select "Download" action for a folder it directs to Zip & Download.

- **Zip & Download (Multiple Files and Folder Download)**

If you choose multiple file and click download button on S-Drive Toolbar, or if you try to download folder by action menu, our service prepares folders and files into a zip file and start to download zip file automatically (Figure 206).
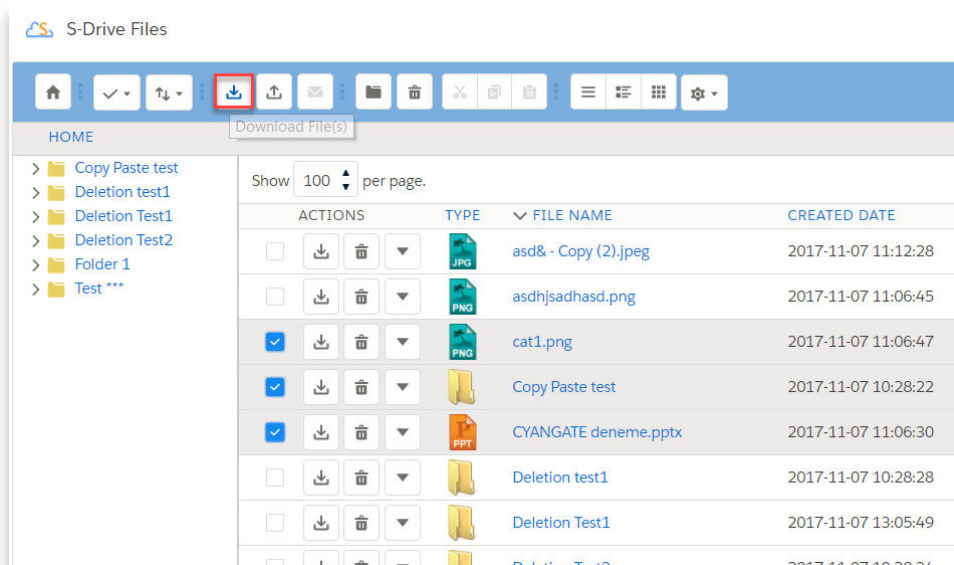


**Figure II-72**

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 207). 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** .

What do you want to do with 20171116073855_Sdrive_Files.zip (128 bytes)?
From: zip.cyangate.com          Open   Save  ∧   Cancel   ✕
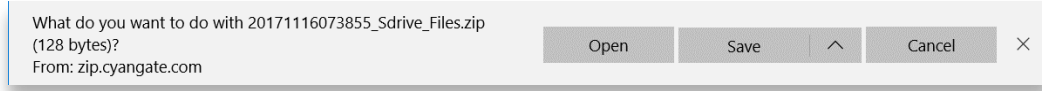
**Figure II-73**

## O. Opening Files

If you want to open the files automatically, you should click "Open" link (Figure 208).

**Figure II-74**

*Notes*

1. You should make some configurations for browsers (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) to enable some types of files for opening. You can reference below links:

   Internet Explorer: http://247support.custhelp.com/app/answers/detail/a_id/8892/~/internet-explorer%3A-no-download-prompt-appears
   http://erptraining.niu.edu/erptraining/PS_browser_settings/ie9.shtml

   Chrome: http://blog.rubbersoft.com/2010/01/how-to-automatically-open-downloaded-files-in-chrome/
   http://www.adeptscience.co.uk/kb/article/1379E

Firefox: http://meruscase.com/customizing-your-experience/how-do-i-auto-open-documents-in-firefox/

http://kb.mozillazine.org/File_types_and_download_actions

## P. 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.
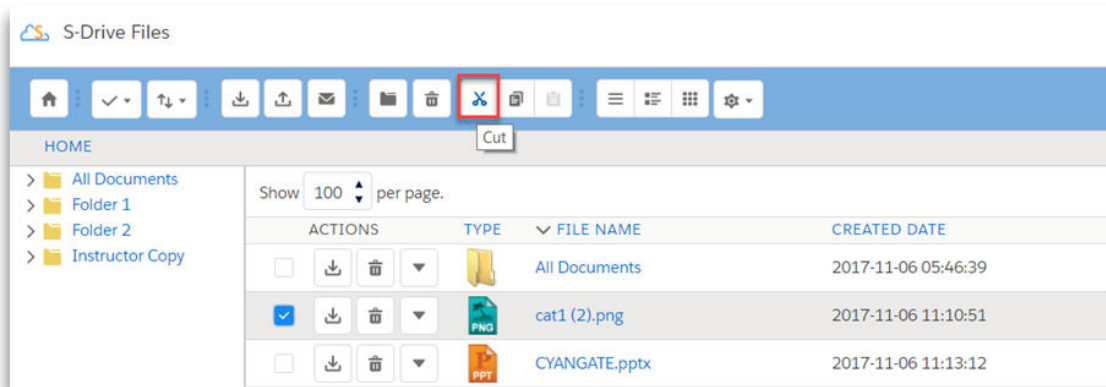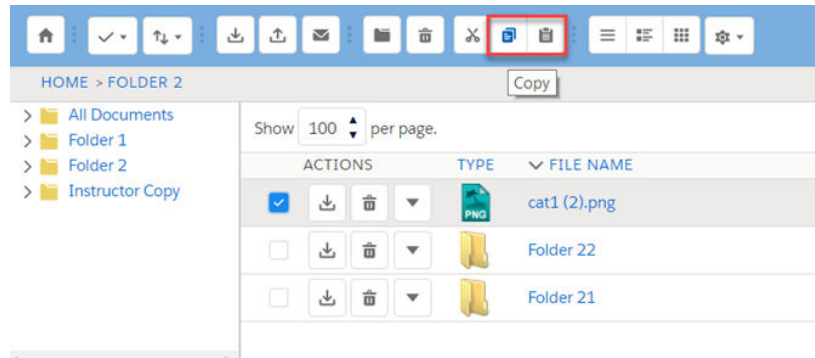


**Figure II-75**

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 210).
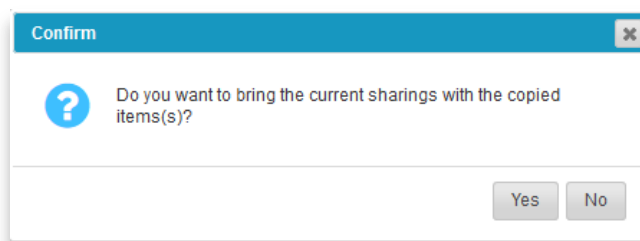


**Figure II-76**

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 211). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.
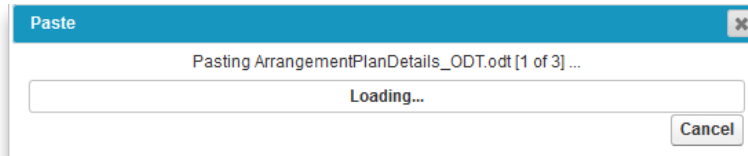
*Figure II-77*

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 212).
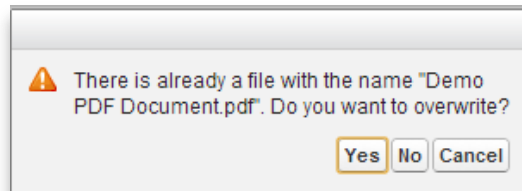


*Figure II-78*

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

![Notes icon]*Notes*

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

## Q.    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"** ( ![icon] ) button at the top menu. Go to the folder where you want to paste the files and select **"Paste"**( ![icon] ) button at the top menu (Figure 213).

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 214).
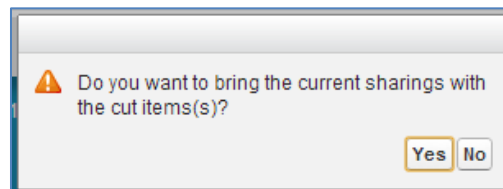
If there is already a file with that name inside the target directory, S-Drive will warn you with the "Do you want continue with paste operation?" message (Figure 215).
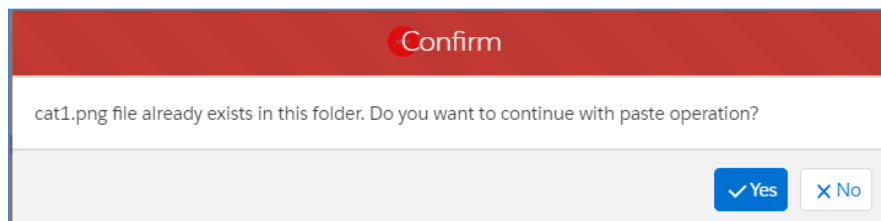
If you select "Yes", it will paste the file and if there are other files in copy list, it will process them. If you select "No", it will skip that file and process other files in the copy list.

*Notes*

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

### R. Shortcuts

You can create shortcuts of files in the same file object or across different file objects
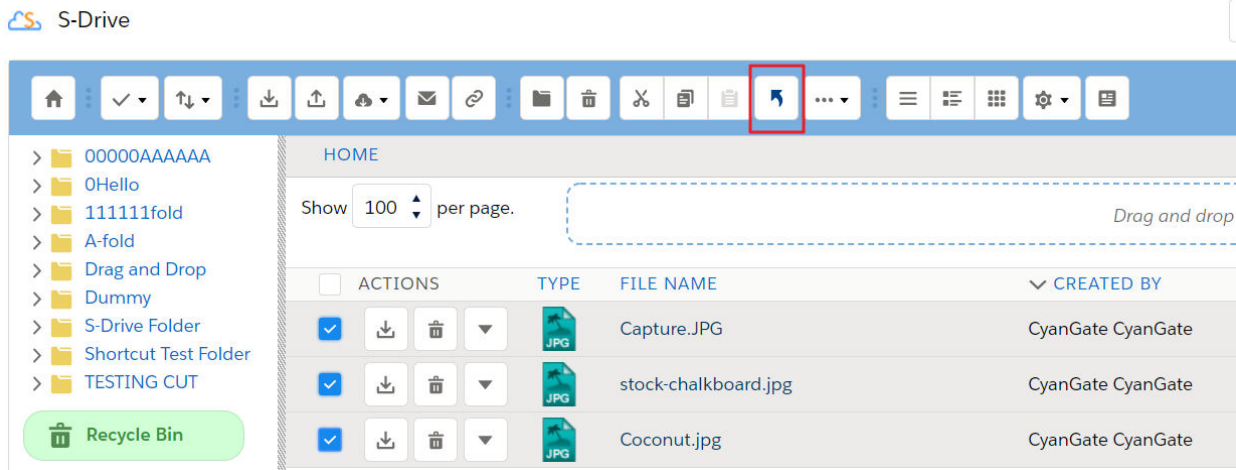
To create shortcuts, select the files you want to create the shortcuts for, and then click on the button on the toolbar (Figure 216). A panel will show up and you'll be asked to select the objects and records you want the shortcuts to be created in.

Step 1  (Figure 217).

Choose the object, file object and the record.

Object: The parent object that you want to create shortcuts under. Example: Account

File Object: The file object selection will be shown if there are multiple file objects related to the parent object. Example: Account File.

Record: The record that you want to create the shortcuts under.

Step 2 (Figure 218).

Once you choose your record, you will be asked to select a folder that the shortcuts will be created under.

Step 3 (Figure 219).

In this step you can either choose to create a new folder to put the shortcuts into or select from the folder tree the folder you want. The selected folder will be highlighted in a yellow color. If you do not choose a folder, the shortcuts will be created under Home.
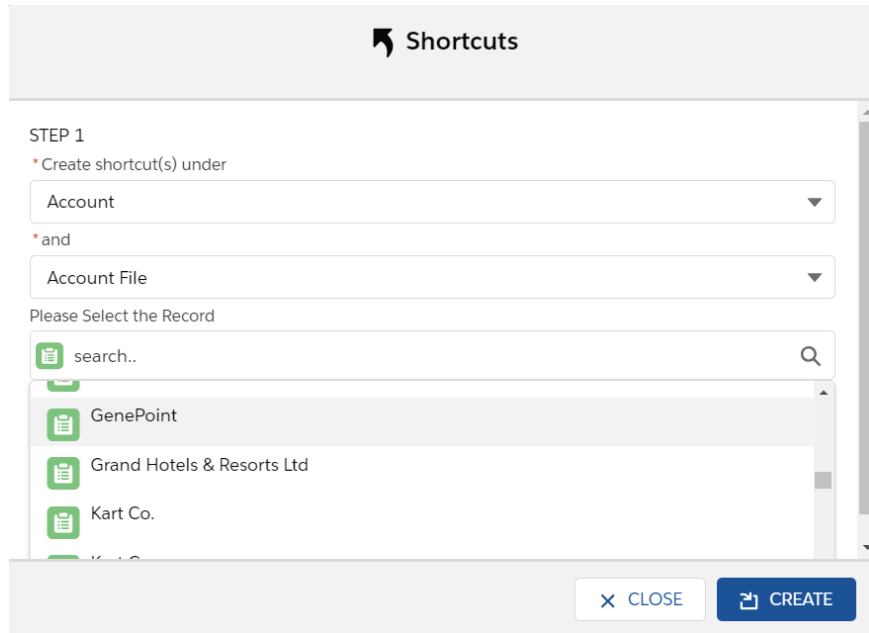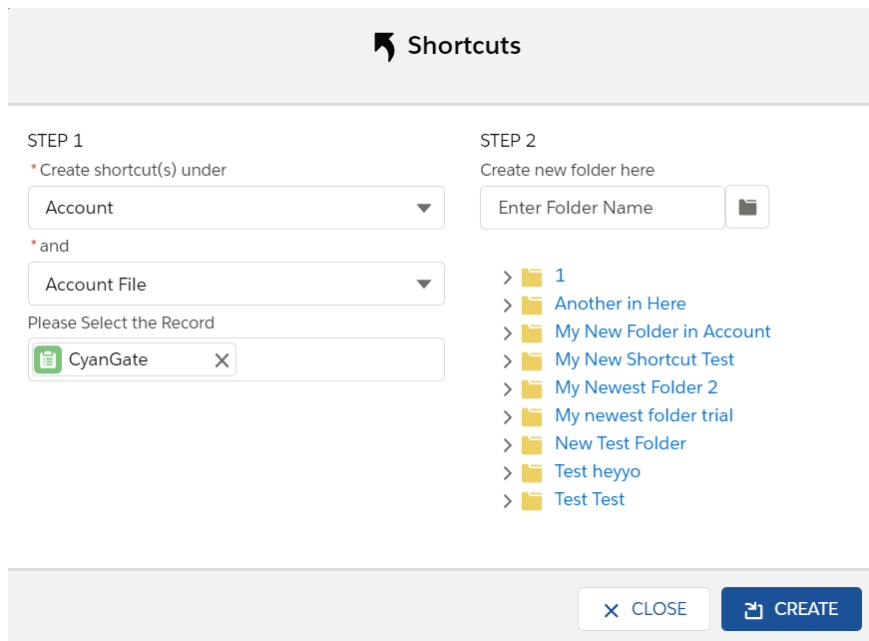
**Figure II-83**



**Figure II-84**

**Figure II-85**

After making the selections, click on "Create" button to create the shortcuts.

A success message will be shown if the shortcuts are created successfully in the destination record.



**Figure II-86**

If something goes wrong in the process, an error message will be shown (Figure 221).

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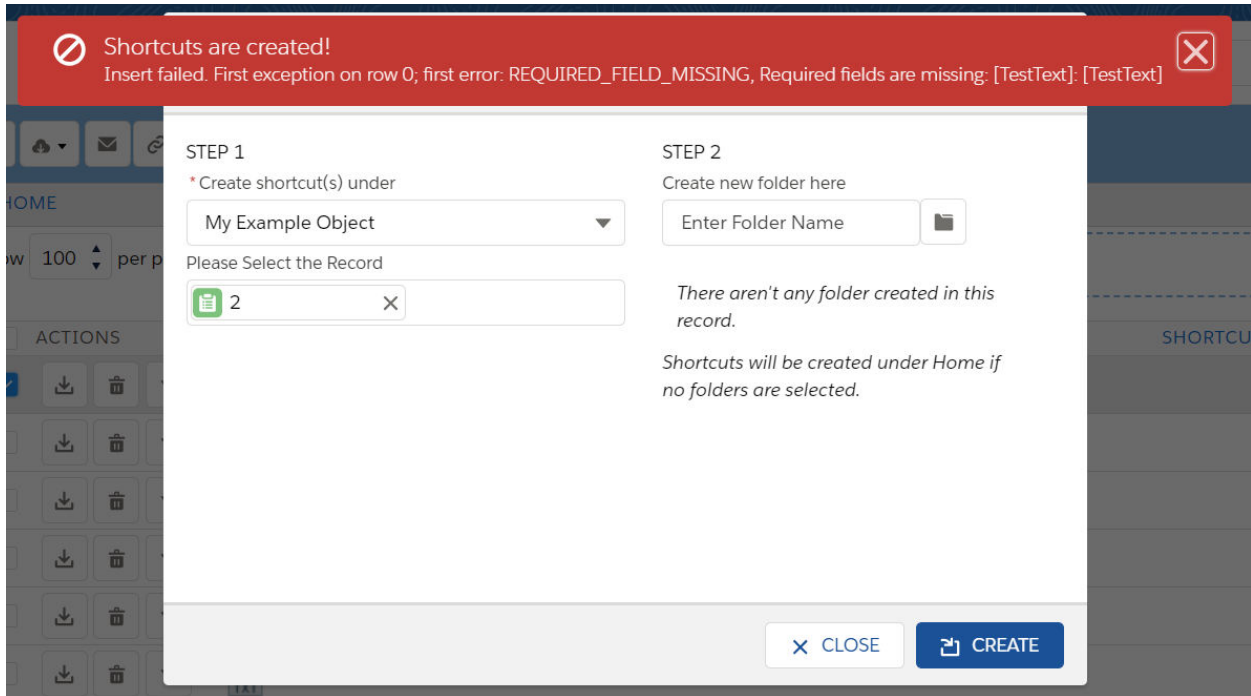
**Figure II-87**

### S.    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 71).



**Figure II-88**

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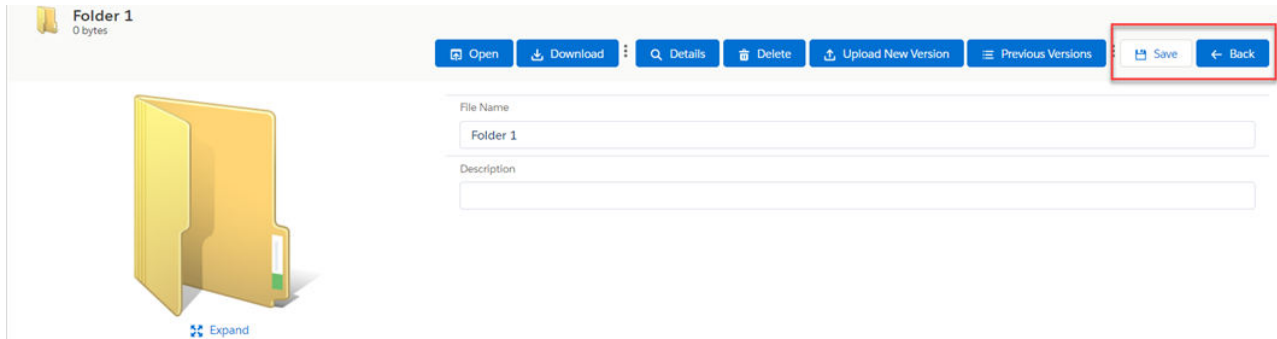


**Figure II-89**


*Notes*

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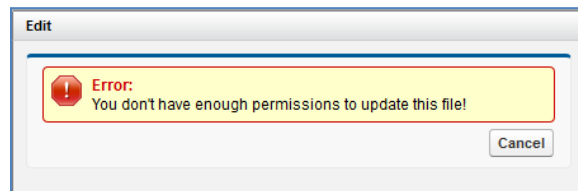


**Figure II-90**

### T.     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.
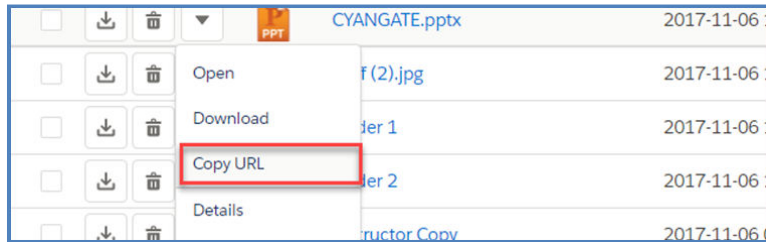


**Figure II-91**

After clicking this button, Copy URL pop-up will be displayed (Figure 226). Select the URL by clicking "Copy" button in this pop-up. You can close this pop-up by clicking "Close" button. After clicking "Copy" button, the button changes to "COPIED!" and the Copy URL for the picture becomes available for usage.
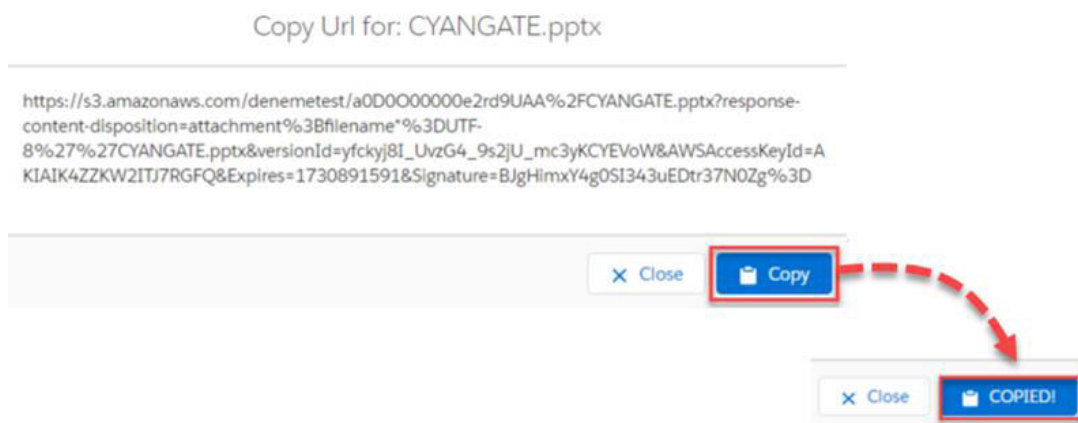


**Figure II-92**

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 227).
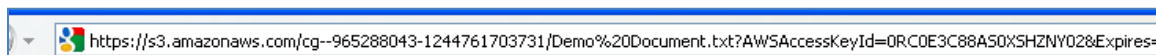


**Figure II-93**

_Notes_

1. This feature is not enabled for folders. Because folders don't have URLs in S-Drive. "Copy URL" item menu action is invisible for the folders.

2. If you want to use shorter URLs, please see S-URL section in "S-Drive Admin Guide".

## U. 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 228).
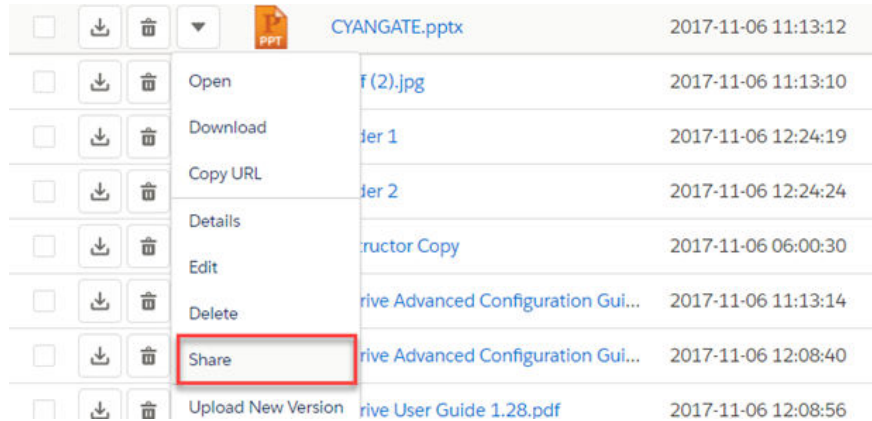
**Figure II-94**

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 229). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.
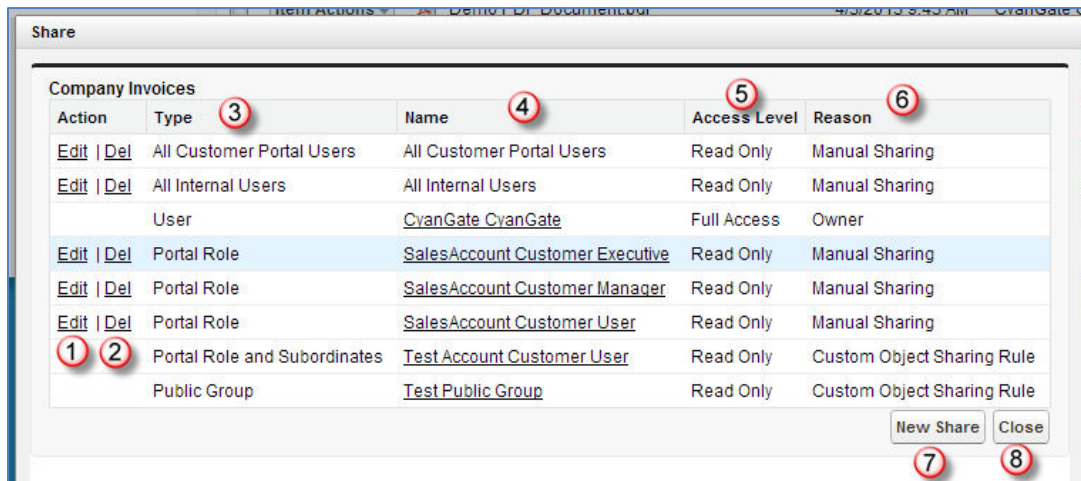
**Figure II-95**

"Action" column is used to edit or delete the manual shares (Figure 229-1 and Figure 229-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 229-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 229-4). 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 229-5). "Reason" column displays the reason of the sharing (Figure 229-6). 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 229-7) and close this screen by clicking "Close" button (Figure 229-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 230). You can select the "Type" from the dropdown (Figure 230-1). Once you select the type, available fields will be listed in "Available" section (Figure 230-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 230-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 230-4). 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 230-5).
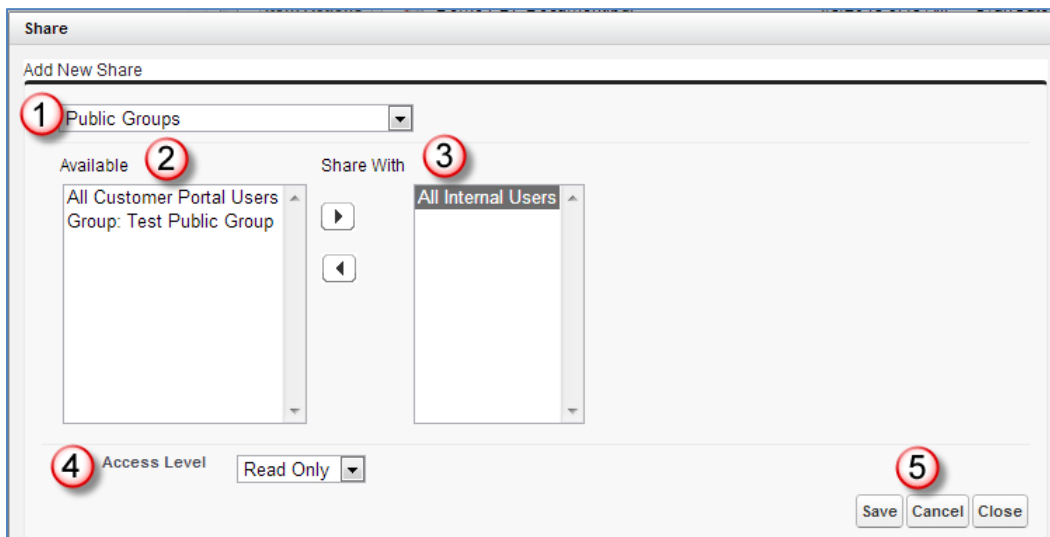


Figure II-96

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 230-1). You can change selected object's access level and save.
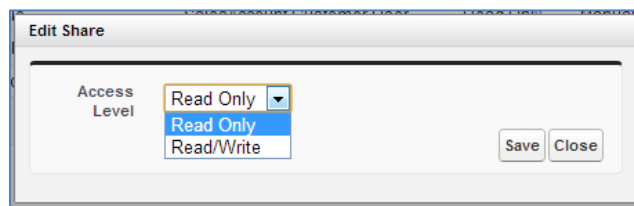


Figure II-97

You can delete a manual sharing by clicking "Delete" in the share lists screen Figure 230-2). If you select "Yes", share will be deleted (Figure 232).
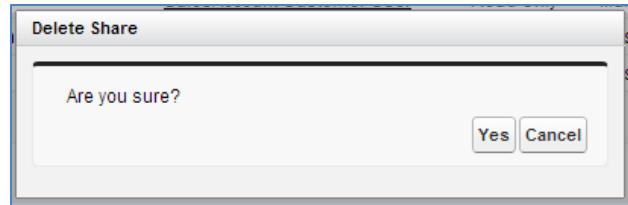
Figure II-98

![Notes]*Notes*

1. Sharing items (files or folder) with "Read Only" access level gives allowed shared user/group/ profile etc. read-only access. That means user can see file details, download file, copy file; but cannot edit, delete, move, rename file. If user has "Read Only" access on a folder he won't be able to see "New Folder", "Upload File(s)", "Cut" buttons.

2. Sharing items (files or folder) with "Read/Write" access level gives allowed shared user/group/ profile etc. read-write access. That means user can see file details, download file, copy, edit, delete, move, and rename file. But cannot delete the file. Only file/folder owner can delete the file.

3. If no sharing is given to the user on a folder, user won't be able to see the folder and its contents.

4. Sharing folders affects sub files and folders. So, if you share a folder, that sharing will be applied to sub files and folders.

5. If sharing is enabled and if you're in a subfolder (not Home folder), you'll see "Inherit Sharing from Parent Folder" checkbox when creating a folder or uploading files. Default is checked. You can uncheck this checkbox if you do not want to inherit shares from parent to the newly created folder or file (Figure 82) at the time of creation.
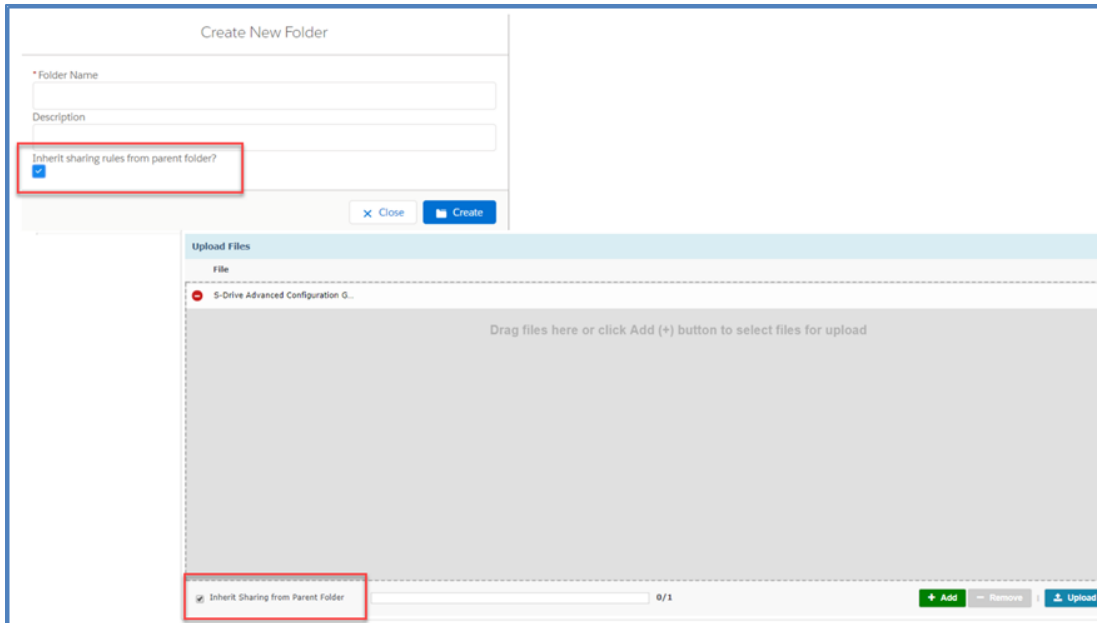
**Figure II-99**

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 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.

## V.    Public Sharing of Files and Folders

Users can now share certain files and folders publicly. If a single file or folder (along with folder's content) will be shared, file/ folder action dropdown can be used.
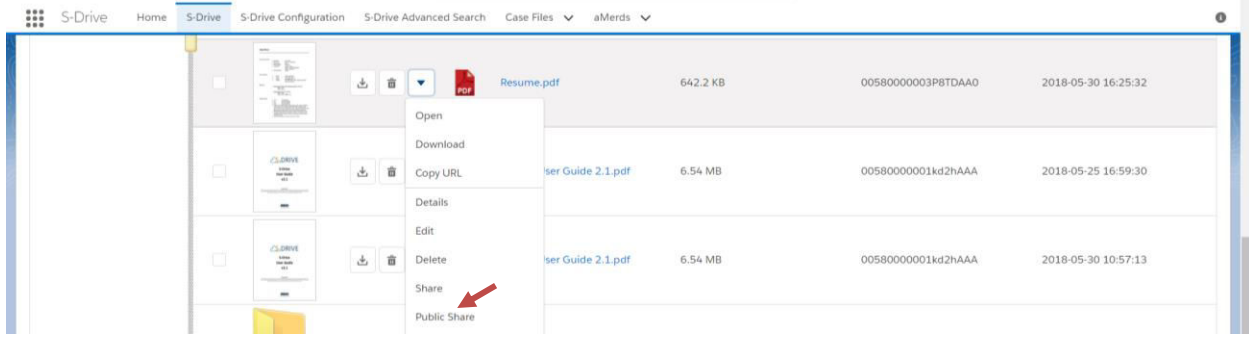
**Figure II-100**

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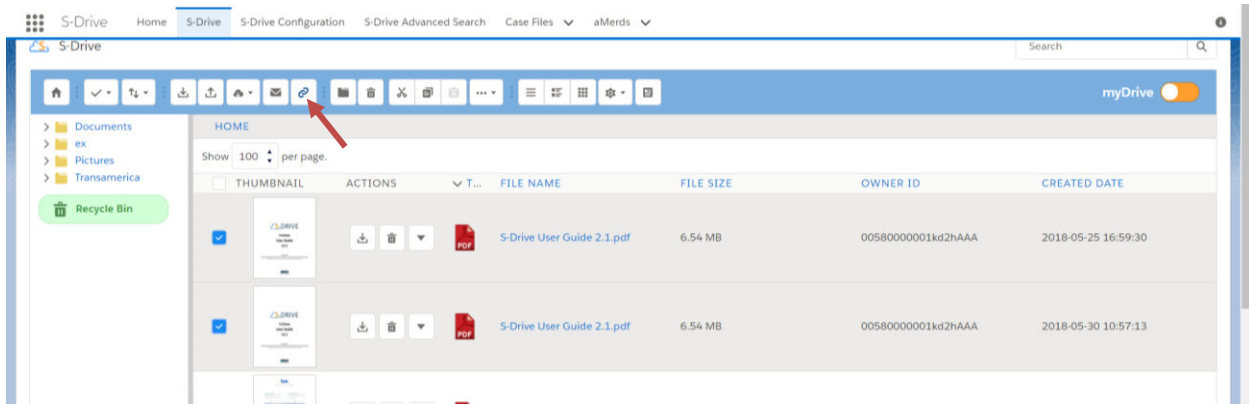


**Figure II-101**

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

### a) *Public Download of Files and Folders*

Upon selection of files and folders and clicking on public link button, selected items get listed. A secure URL gets generated automatically as well.
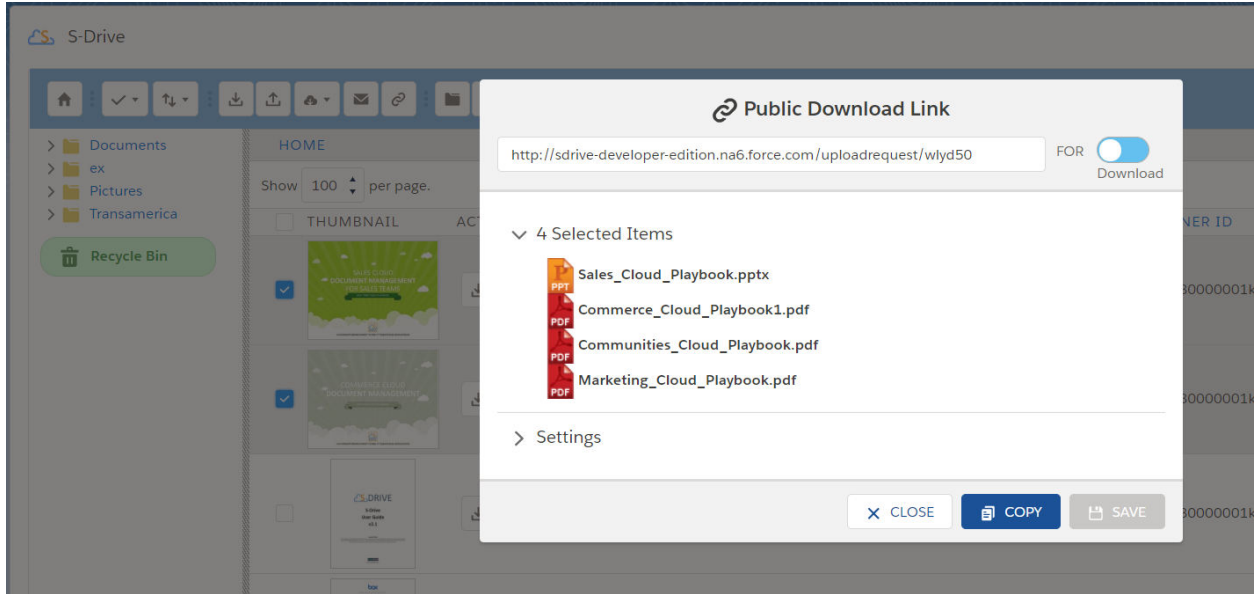
Figure II-102

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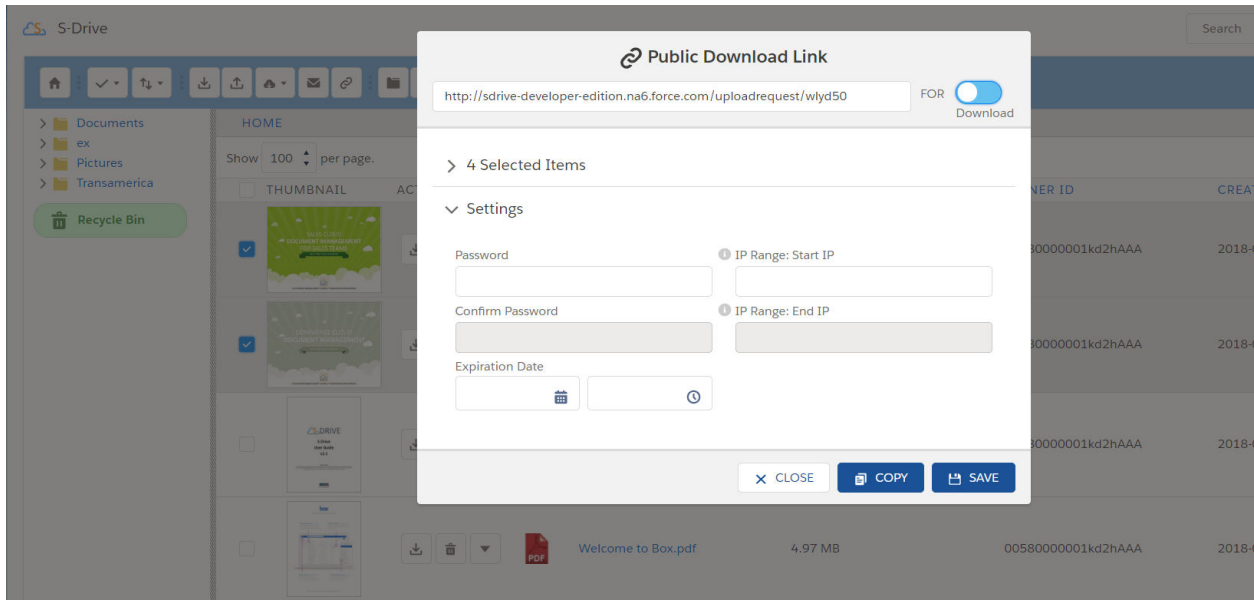


Figure II-103

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

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*b)* ***Public Access to Files and Folders***

Upon selection of files and folders and clicking on public link button, selected items get listed. A secure URL gets generated automatically as well.
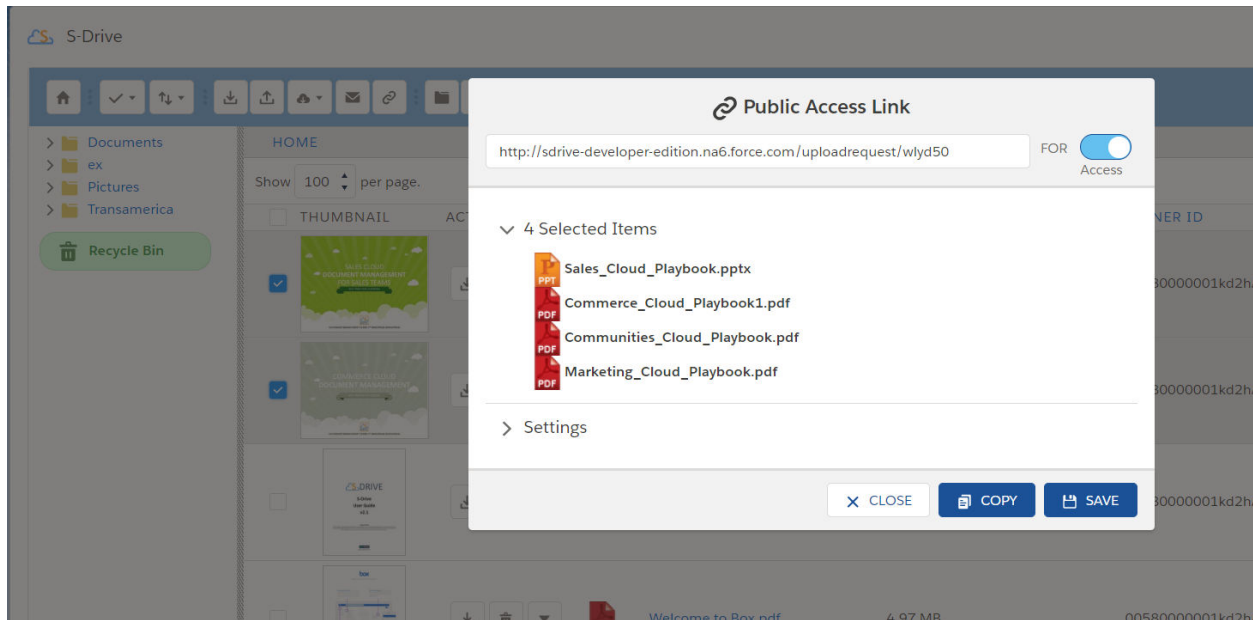
There is also a Settings section where a user can define how selected items can be accessed.

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

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

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

**Delete:** This option brings the public user access to delete selected items
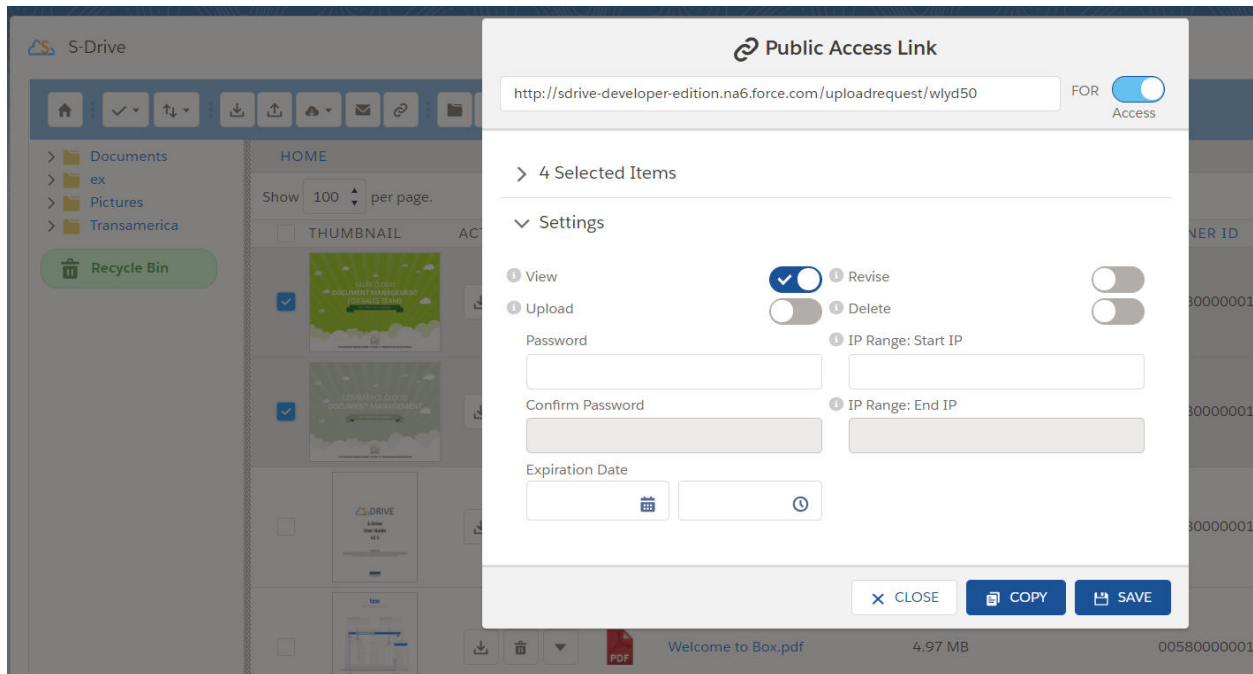
Figure II-105

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

## W.    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. Only HTML Upload Manager supports version upload.
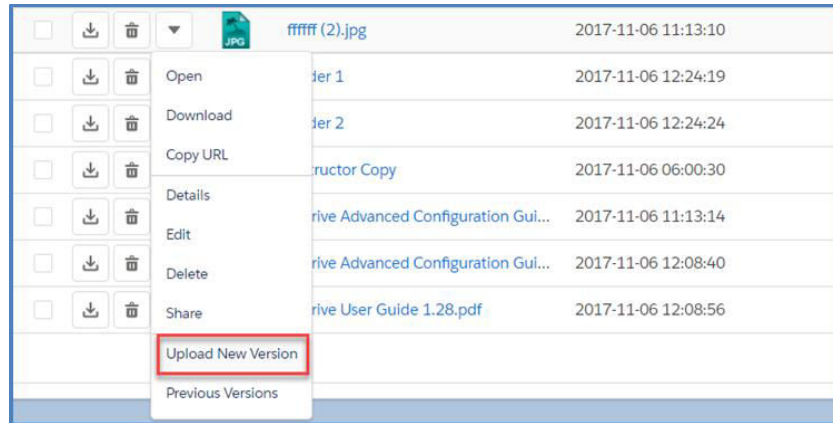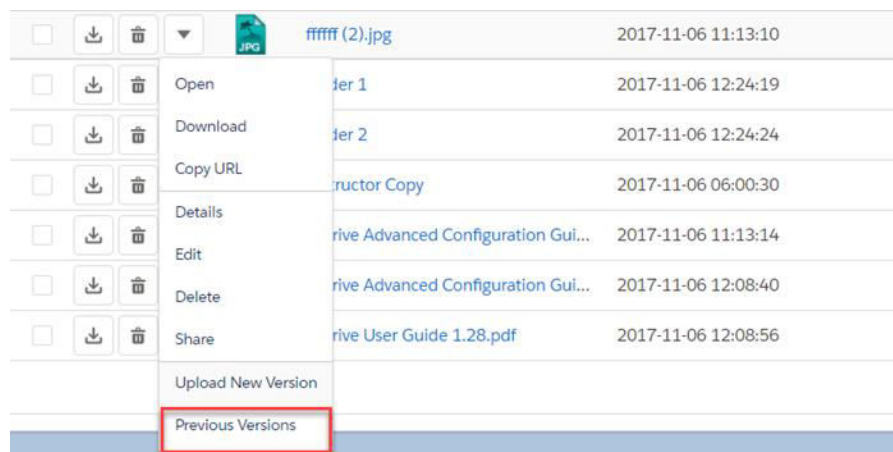
Figure II-106

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.

## X. 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 II-107

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.
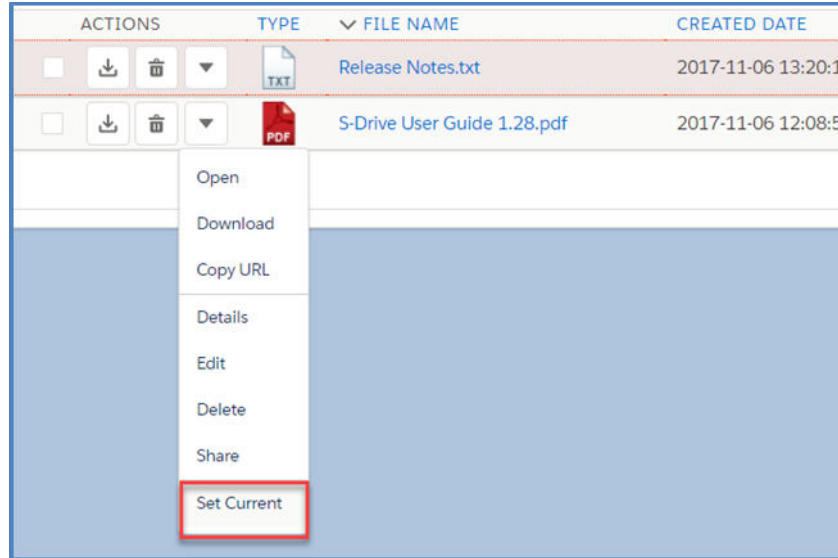
**Figure II-108**

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

actions are same as the other item actions explained above.

## Y.    Check-In & Check-Out

Check-In & Check-Out lets you lock files, preventing others from modifying or deleting the file while you're working on it. If the feature is enabled from the configuration page, a file without any lock has "Check-Out" option under its action menu and its details page shows an up-arrow icon, which again lets users check out the file
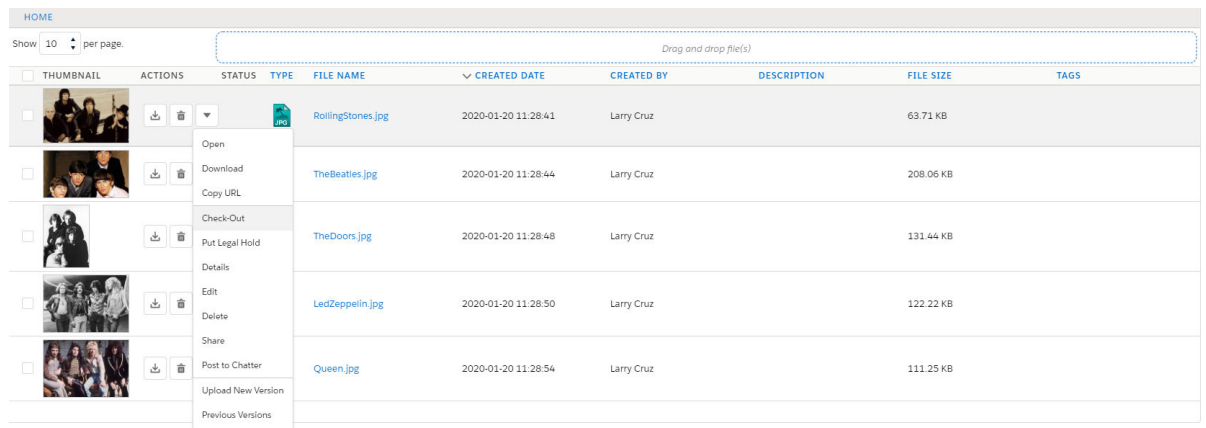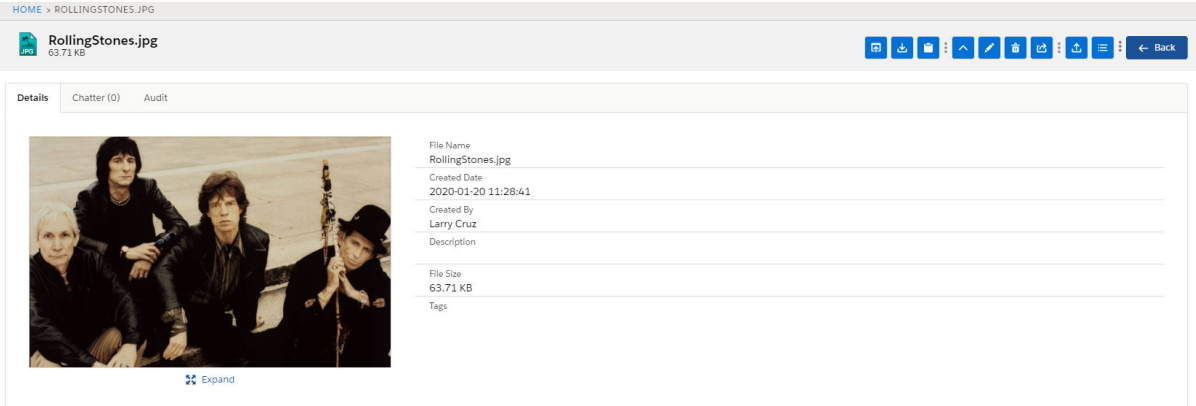


**Figure II-109**

After clicking Check-Out, nothing changes for you as the user who checked out the file. You can still modify the file, delete it, or upload a new version to it. You can see a small lock icon under the STATUS column, indicating that the file is checked-out.

However, for other users, the file can no longer be edited or deleted. The delete button becomes disabled, and the action menu has fewer options to choose from as shown below.
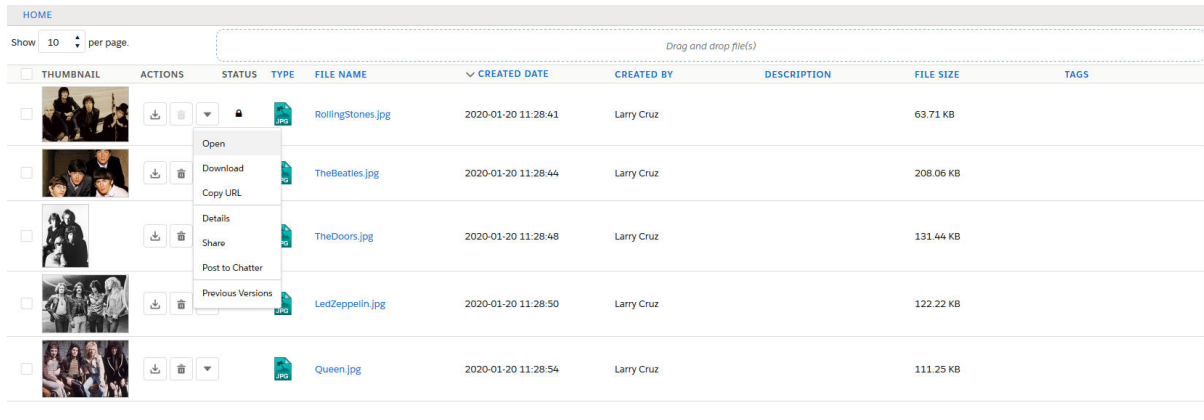
If a user has the special RemoveLockPermission custom permission, or if you are the System Administrator, you get the right to check-in files without waiting for the user who checked-out that file.

The same restrictions apply to the preview page of the file as well as shown below.
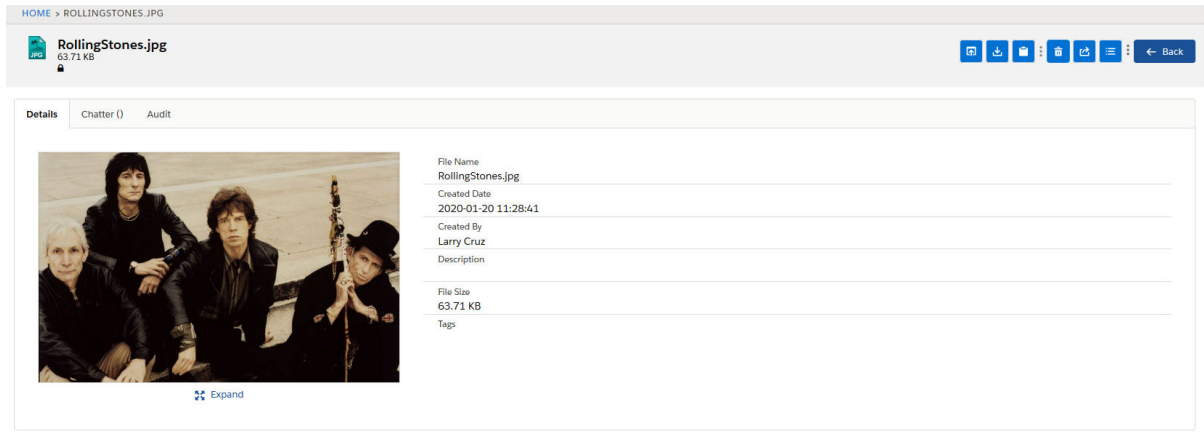
  
Figure II-112

Note that the lock icon that was available under the STATUS column now appears under the file name on top-left corner. Hovering over that lock shows who checked out the file.

When the user who checked-out the file uploads a new version, the file is checked-in automatically. When a file with previous versions is checked-out, all previous versions become checked-out as well.

The "checked out files" folder (displayed under the recycle bin) shows all files that the user can check-in. If someone is a Sys Admin or has RemoveLockPermission, files checked-out by other users will be shown, otherwise only the files checked-out by that user

## Z.    Legal Hold

Legal Hold lets you lock files, preventing others from modifying or deleting the file. It is similar to Check-In & Check-Out but with some minor differences. File objects that can be put under legal hold should be explicitly selected from the S-Drive configuration page, and only certain users, i.e., System Administrators and holders of RemoveLockPermission, can put files under legal hold and remove files from legal hold. If the feature is enabled from the configuration page and the file object (e.g. cg__S3Object__c) is selected, a file that isn't under legal hold would have a button called "Put Legal Hold" under its action menu and its details page shows a gavel icon, which again lets users put the file under legal hold.

| ACTIONS | | | | STATUS | TYPE | ∧ FILE NAME | CREATED DATE | CREATED BY | DESCRIPTION | FILE SIZE | TAGS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | ⤓ | 🗑 | ▼ | | JPG | TheDoors.jpg | 2020-01-20 11:28:48 | Larry Cruz | | 131.44 KB | |
| ☐ | ⤓ | 🗑 | | Open | | TheBeatles.jpg | 2020-01-20 11:28:44 | Larry Cruz | | 208.06 KB | |
| ☐ | ⤓ | 🗑 | | Download | | RollingStones.jpg | 2020-01-20 11:28:41 | Larry Cruz | | 63.71 KB | |
| ☐ | ⤓ | 🗑 | | Copy URL | | Queen.jpg | 2020-01-20 11:28:54 | Larry Cruz | | 111.25 KB | |
| ☐ | ⤓ | 🗑 | | Check-Out | | LedZeppelin.jpg | 2020-01-20 11:28:50 | Larry Cruz | | 122.22 KB | |
| | | | | Put Legal Hold | | | | | | | |
| | | | | Details | | | | | | | |
| | | | | Edit | | | | | | | |
| | | | | Delete | | | | | | | |
| | | | | Share | | | | | | | |
| | | | | Post to Chatter | | | | | | | |
| | | | | Upload New Version | | | | | | | |
| | | | | Previous Versions | | | | | | | |

**Figure II-113**

HOME > THEDOORS.JPG

**TheDoors.jpg**
131.44 KB

Details    Chatter (0)    Audit

File Name
TheDoors.jpg
Created Date
2020-01-20 11:28:48
Created By
Larry Cruz
Description

File Size
131.44 KB
Tags

**Figure II-114**

After clicking "Put Legal Hold", nothing changes for you as the user who put the file under legal hold. You can still modify the file, delete it, or upload a new version to it. You can see a small gavel icon under the STATUS column, indicating that the file is under legal hold.

However, for other users, file can no longer be edited or deleted. The delete button becomes disabled, and the action menu has fewer options to choose from.

Figure II-115

If a user has the special RemoveLockPermission custom permission, or if you are the System Administrator, you get the right to remove files from legal hold without waiting for the user who put them under legal hold in the first place.

When the user who put the file under legal hold uploads a new version, the new versions are also put under legal hold.

When a file with previous versions is put under legal hold, all previous versions are put under legal hold as well.

The same restrictions apply to the preview page of the file as well.



Figure II-116

Note that the gavel icon that was available under the STATUS column now appears under the file name on top-left corner. Hovering over that icon shows who put the file under legal hold.

## AA.    File Activities

When File Activities are enabled in S-Drive Configuration, the file activities recorded for a file record are displayed in file record's detail page under "Audit" tab.



HOME > CAT 1.JPG

Cat 1.jpg
1.11 MB                                                              ← Back

Details     Chatter (1)     Audit

▼ Filters                                                        ‹  1 ↕  ›

| | Activity Type | User | Activity Date ↓ | Additional Details |
|---|---|---|---|---|
| 1 | Download | User User | Jan 21, 2020 | |
| 2 | Open | User User | Jan 21, 2020 | |
| 3 | Download | User User | Jan 21, 2020 | |
| 4 | Open | User User | Jan 21, 2020 | |
| 5 | Download | User User | Jan 21, 2020 | |
| 6 | Copy URL | User User | Jan 21, 2020 | |
| 7 | Open | User User | Jan 21, 2020 | |
| 8 | Open | User User | Jan 21, 2020 | |
| 9 | Download | User User | Jan 21, 2020 | |
| 10 | Open | User User | Jan 21, 2020 | |
| 11 | Download | User User | Jan 21, 2020 | |

**Figure II-117**

Here all file activities recorded for the file will be displayed in a tabular format sorted by Created Date. You can change the sort order by clicking each header in the table: Activity Type, Created By or Created Date.

*Note: It is not possible to sort by Additional Details column.*

You can also navigate through pages using the pagination buttons at the right top corner. Each page has 20 file activity records.

In order to view filters and filter the file activity records for a specific file record, click on the "Filters" button on the top left corner of the table.
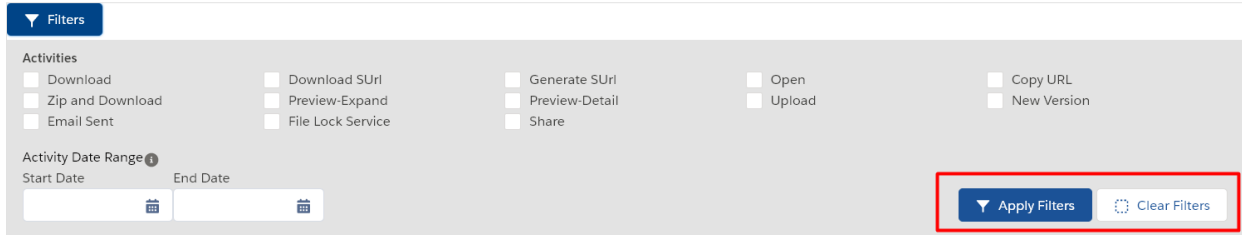
Figure II-118

Here you can select the type of activities using the checkboxes, to change the displayed activities based on type. You can also apply a date range in order to see the activities recorded between specific dates. In order to apply filters, click on "Apply Filters" button. To clear all filters on checkboxes and dates, click on "Clear Filters" button. This way, all file activities will be listed in the table. You can click on "Filters" button to close the filters section.

*Note: If you enter an invalid date for Start Date or End Date, a warning message will show up.*

## BB.    Changing Displayed Fields

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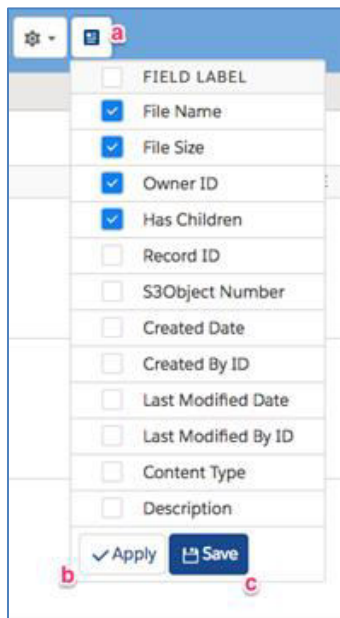


Figure II-119

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

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

## CC.    Searching Items

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

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

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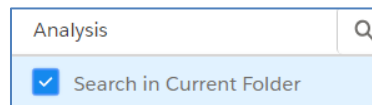


**Figure II-120**

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

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

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

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

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

**Figure II-121**

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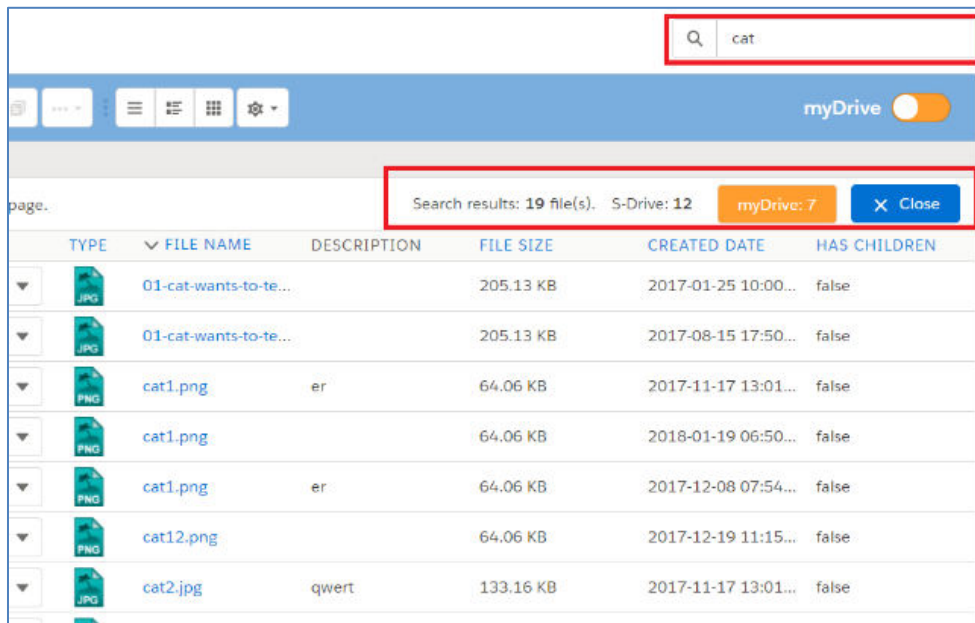


**Figure II-122**

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

*Notes*

1. Salesforce.com does not index uploaded files immediately, so newly uploaded files will be eligible for search in a few minutes after the upload.

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

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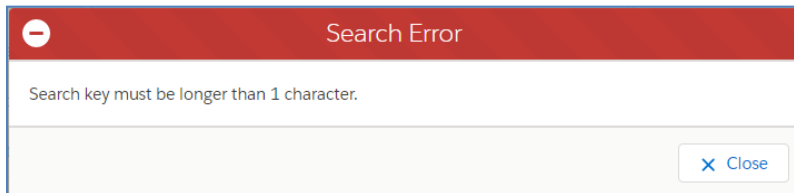


**Figure II-123**

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

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



**Figure II-124**

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).

But currently you **cannot upload files, download files using Download Manager for bulk download** with your iOS device. Because iOS devices do not support Flash and Java technologies that our upload widgets use. We're planning to add upload feature in next releases.

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

Below is a screenshot of the Case Files section from an iPad device.

Figure II-126

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## EE.     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 Admin Guide". You can also use multiple S-Drive components under a single object, following the instructions in "S-Drive Admin Guide".

- **Account Files**

After installing S-Drive, if you made the configuration correctly, you will 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 251). Otherwise please consult to the *S-Drive Admin Guide* to activate "Account Files" section.
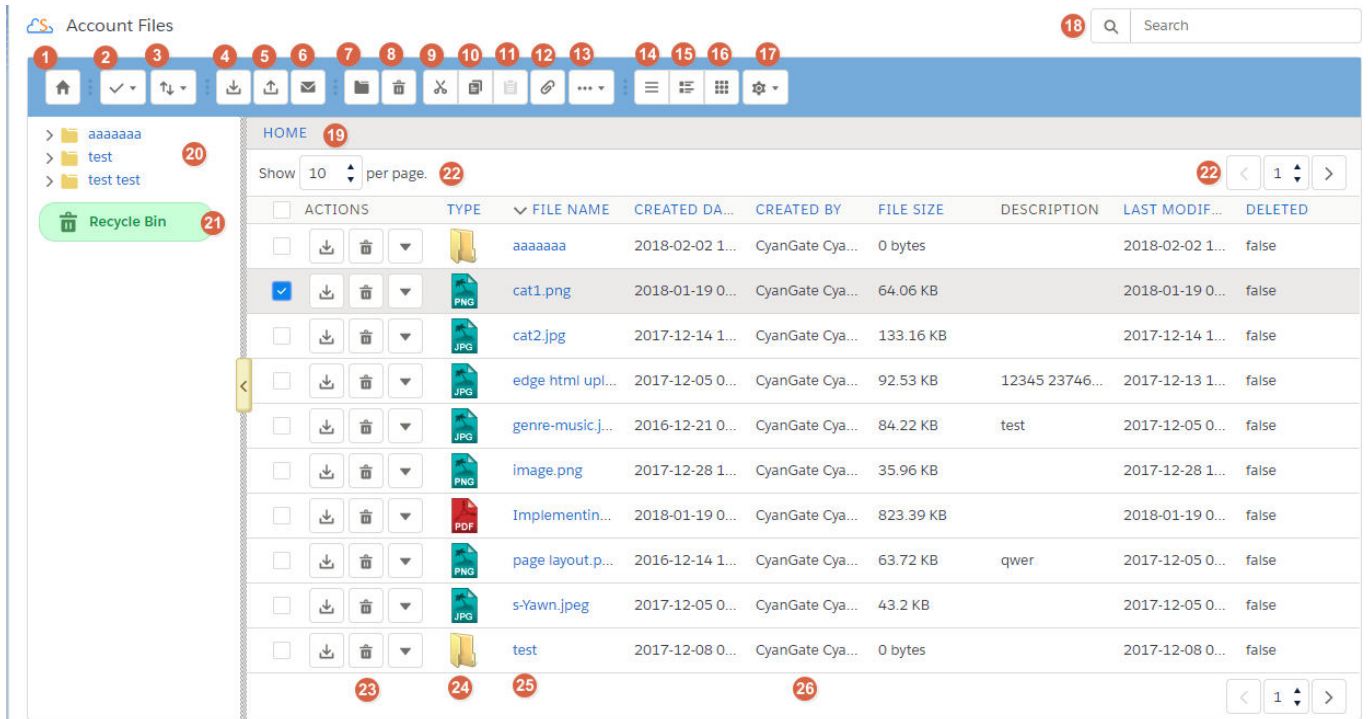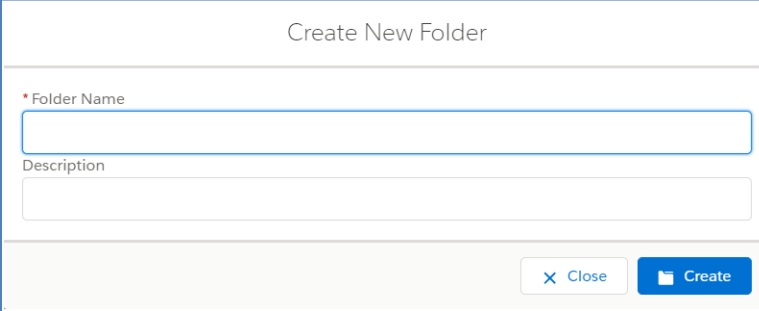


**Figure II-127**

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

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

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

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

(5) **"Upload File(s)"** button is used to upload file(s) to this account. See "Uploading Files" section for more information (Figure 92-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 92-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 251-7). When you click on this button **"Create New Folder"** screen pops up (Figure 252). This item is not displayed for the "Search Results View".



Create New Folder

* Folder Name

Description

✕ Close    📁 Create

<p align="center">**Figure II-128**</p>

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 251-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 251-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 251-10).

**(11)** **"Paste"** button is used to paste the copied or cut file(s) to a folder. This button is not visible until files are selected for cut/copy. See "Moving Files" and "Copying Files" sections for more information (Figure 251-11). This item is not displayed for the "Search Results View".

**(12)** "**Attach From S-Drive"** button is used to attach files from S-Drive Folders to this account. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.
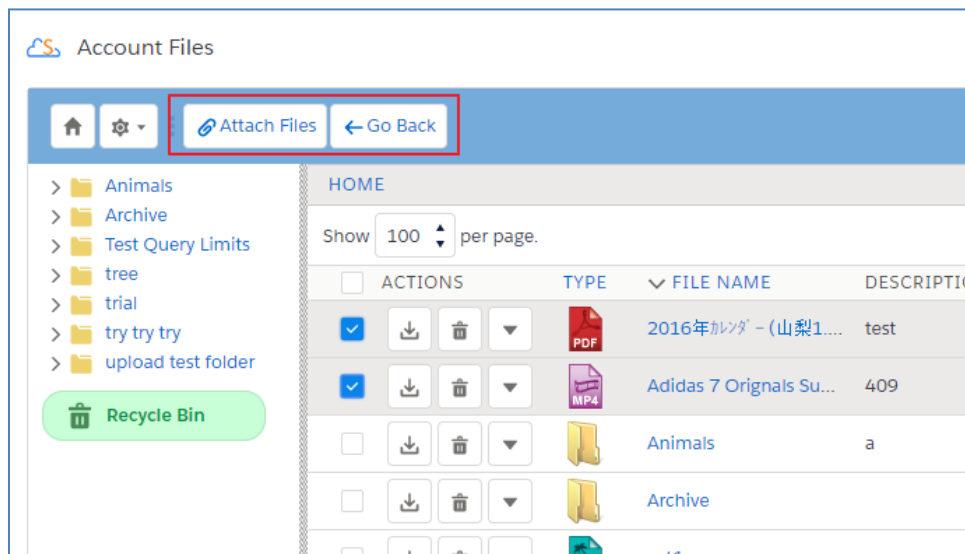


**Figure II-129**

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



**Figure II-130**

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

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

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

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

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

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

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

    c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 92) will not be shown in the panel.

    d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 92 will not be shown.

**(18)** "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 251).

**(19)** "**Breadcrumb Folder Navigation**" keeps the current folder information. For example, if you are under *"Home/Company Invoices"* folder, the location information will be displayed in this area (Figure 251). You can click any level to drill down to that subfolder.

**(20)** **"Folder Tree View"** displays your account's folder structure. Your home folder is named as **"Home"** and your folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will show its contents on the panel when clicked.

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

**(22)** **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 251). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. Total items include only current folder items, not subfolder items. For example, if there are 108 items in the folder, first 100 items will be displayed in first page and last 8 items will be displayed in the 2$^{nd}$ page.

**(23)** **"Actions Column"** contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 251). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

- **"Open"** is used to open the selected account file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.
- **"Download"** is used to download selected account file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

- **Copy URL"** is used to copy the URL of the selected account file. After clicking this link, a popup will appear along with the URL of the selected file. This item menu action is only for files and not available for folders.



Copy Url for: CYANGATE.pptx

https://s3.amazonaws.com/denemetest/a0D0O00000e2rd9UAA%2FCYANGATE.pptx?response-content-disposition=attachment%3Bfilename*%3DUTF-8%27%27CYANGATE.pptx&versionId=yfckyj8I_UvzG4_9s2jU_mc3yKCYEVoW&AWSAccessKeyId=AKIAIK4ZZKW2ITJ7RGFQ&Expires=1730891591&Signature=BJgHimxY4g0SI343uEDtr37N0Zg%3D

× Close | Copy

× Close | COPIED!
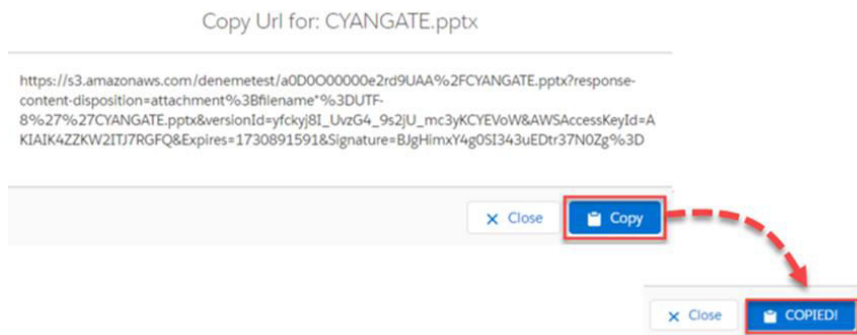
**Figure II-131**

- **"Details"** is used to open the details page of the selected account file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
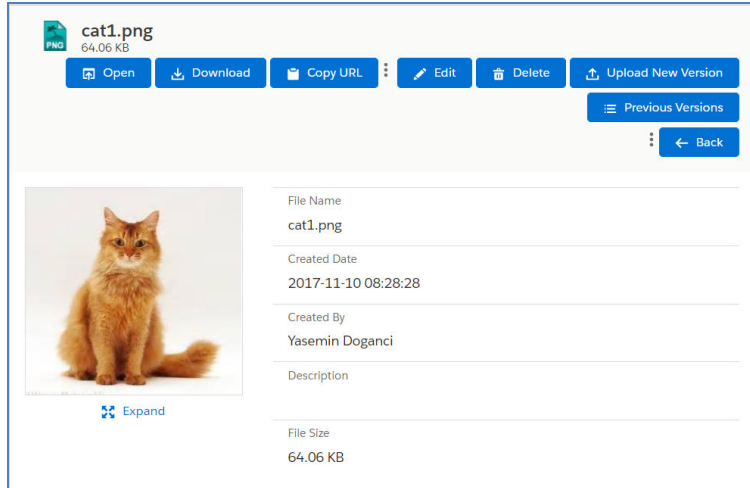
Figure II-132

- **"Edit"** is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 102) and you'll be able to edit current account file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
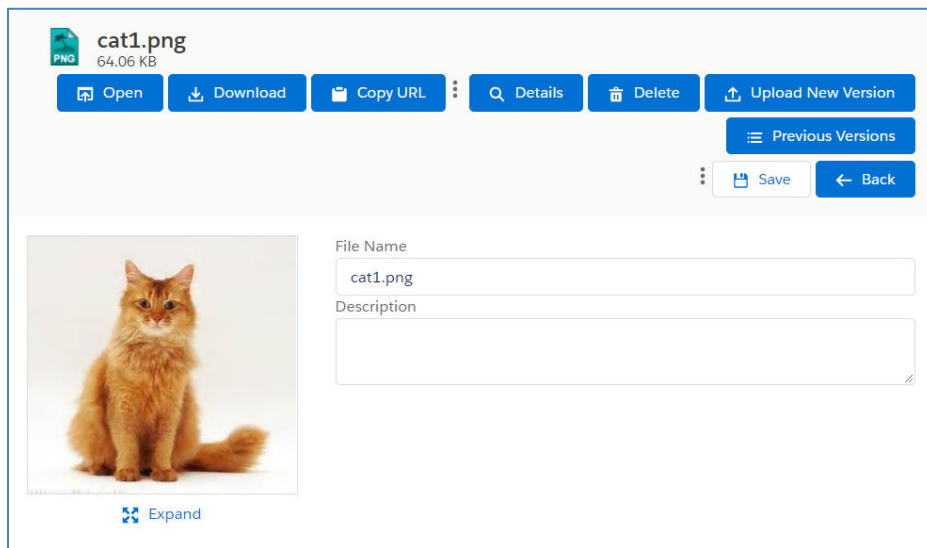


Figure II-133

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


*Notes*

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

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

- **"Upload New Version"**: *[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.]* You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files (Figure 103). Only HTML Upload Manager supports version upload.



**Figure II-134**

- **"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 104).



**Figure II-135**

- **"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 105).
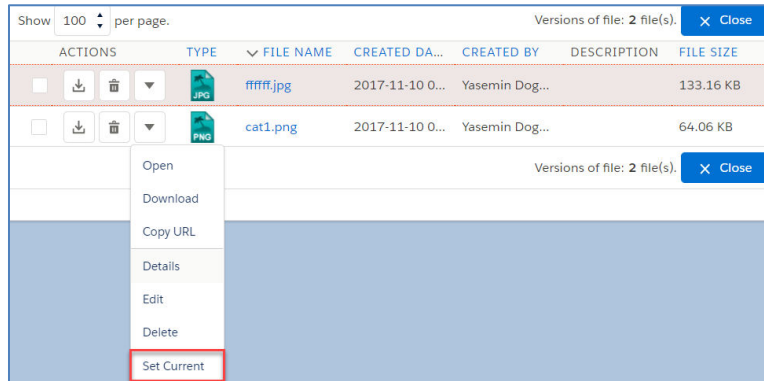


**Figure II-136**

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

**(24) "Content Type Column"** displays a type icon based on the content type of the account file/folder (Figure 92).

**(25) "File Name Column"** shows the file name information for the account files (Figure 92). You can sort files/folder ascending or descending by clicking the field header.

**(26) "Customizable Field Columns"** are used to display customizable fields (Figure 92). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured, you will see, "Created Date", "Created By", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.


*Notes*

1. You cannot delete an account which has account files attached. You'll get an error message if you try to delete this kind of account (Figure 106). You need to delete account files first, and then you can delete the account.

There are account files attached to this account. You need to first delete account files manually and then delete the account!

**Figure II-137**

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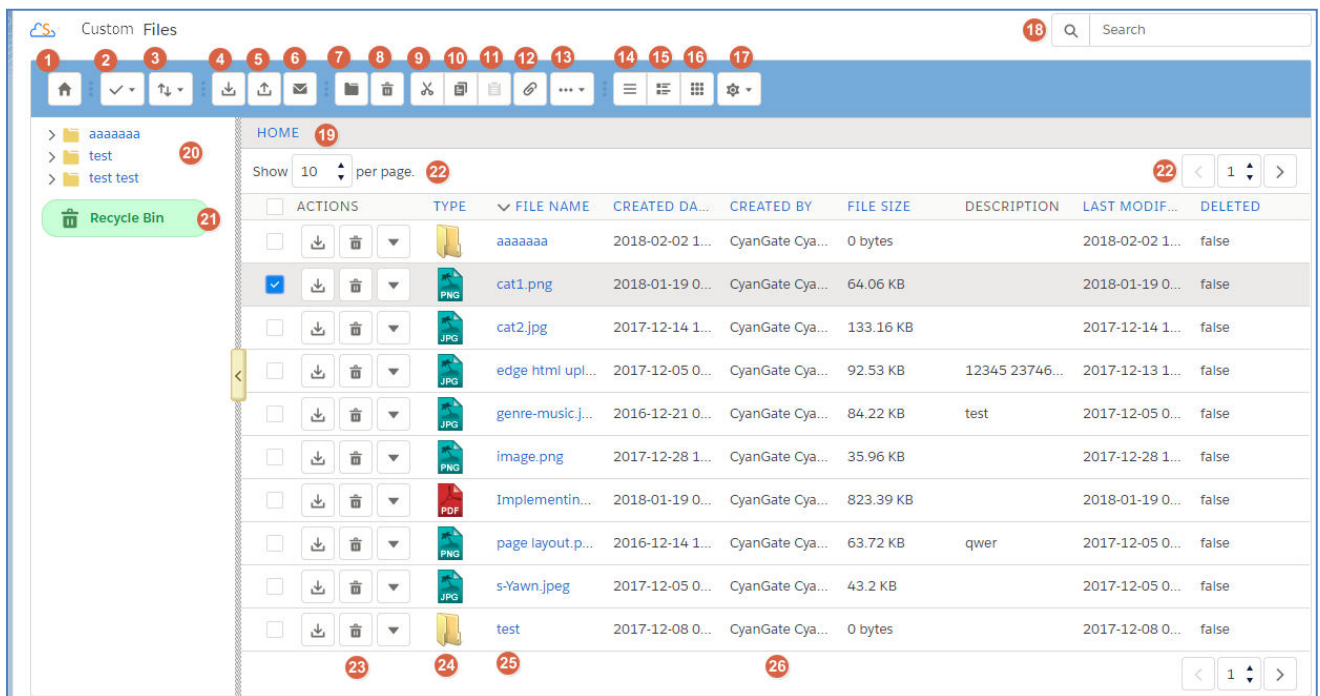


**Figure II-138**

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

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

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

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

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

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

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

Create New Folder

* Folder Name

Description

✕ Close   📁 Create
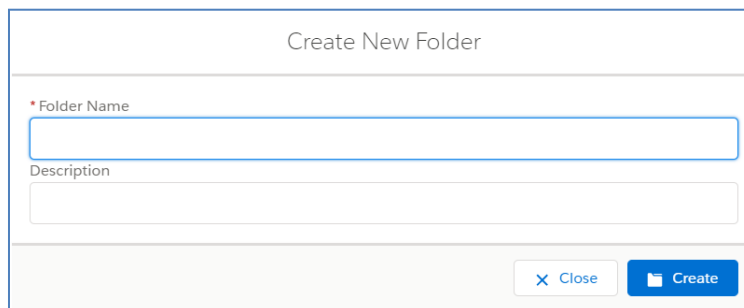
**Figure II-139**

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

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

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

(11) **"Paste"** button is used to paste the copied or cut file(s) to a folder. This button is not visible until files are selected for cut/copy. See "Moving Files" and "Copying Files" sections for more information. This item is not displayed for the "Search Results View".

**(12)** "**Attach From S-Drive**" button is used to attach files from S-Drive Folders to this custom object. After clicking this button "S-Drive Folders" screen will be initialized. There will be two buttons above the toolbar section to attach files to this contact. You need to select file(s) to attach, and then click "Attach File(s)" button to start attaching. Attaching is a copy operation, so a new copy of the file will be created once attach is completed.
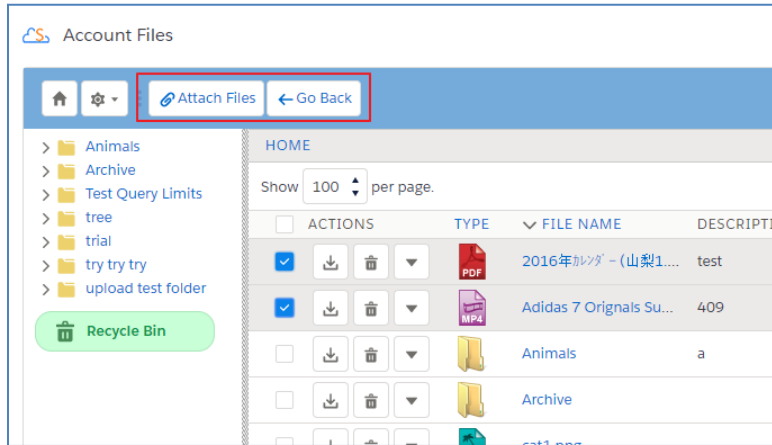


**Figure II-140**

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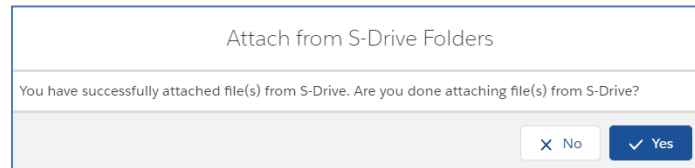


**Figure II-141**

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

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

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

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

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

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

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

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

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

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

**(19)** "**Breadcrumb Folder Navigation**" keeps the current folder information. For example, if you are under *"Home/Company Invoices"* folder, the location information will be displayed in this area (Figure 92). You can click any level to drill down to that subfolder.

**(20)** **"Folder Tree View"** displays your custom object's folder structure. Your home folder is named as **"Home"** and your folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will show its contents on the panel when clicked.

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

**(22)** **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number. If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. Total items include only current folder items, not subfolder items. For example, if there are 108 items in the folder, first 100 items will

be displayed in first page and last 8 items will be displayed in the 2<sup>nd</sup> page.

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

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

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

- **"Copy URL"** is used to copy the URL of the selected custom object file. After clicking this link, a popup will appear along with the URL of the selected file (Figure 100). This item menu action is only for files and not available for folders.



Copy Url for: CYANGATE.pptx

https://s3.amazonaws.com/denemetest/a0D0O00000e2rd9UAA%2FCYANGATE.pptx?response-content-disposition=attachment%3Bfilename*%3DUTF-8%27%27CYANGATE.pptx&versionId=yfckyj8I_UvzG4_9s2jU_mc3yKCYEVoW&AWSAccessKeyId=AKIAIK4ZZKW2ITJ7RGFQ&Expires=1730891591&Signature=BJgHimxY4g0SI343uEDtr37N0Zg%3D

X Close    📋 Copy

X Close    📋 COPIED!
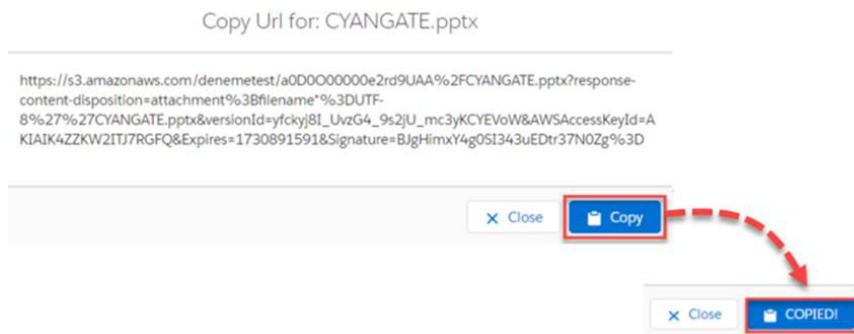
**Figure II-142**

- **"Details"** is used to open the details page of the selected custom object file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
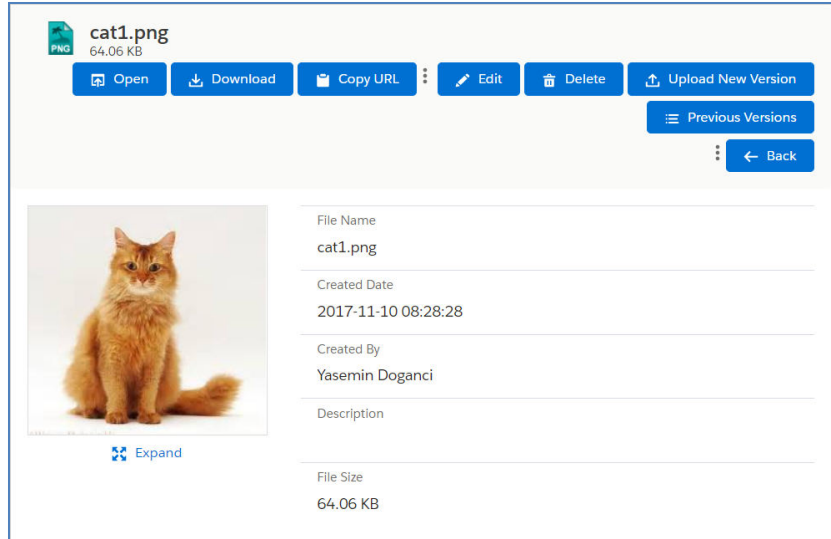
Figure II-143

- **"Edit"** is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 102) and you'll be able to edit current custom object file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
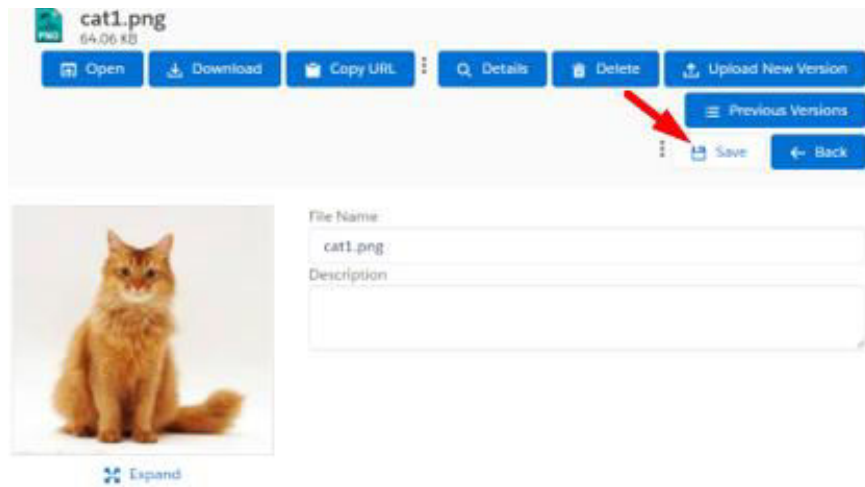


Figure II-144

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

 *Notes*

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

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

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



**Figure II-145**

- **"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.
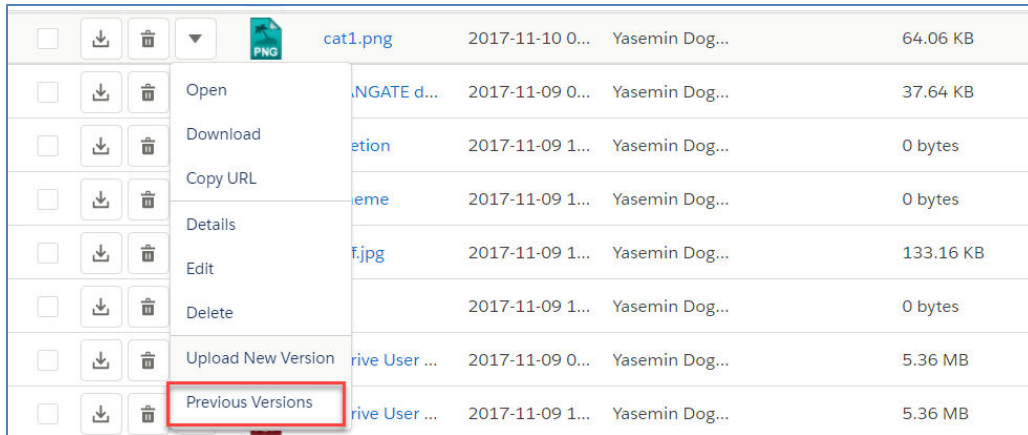
**Figure II-146**

- **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.
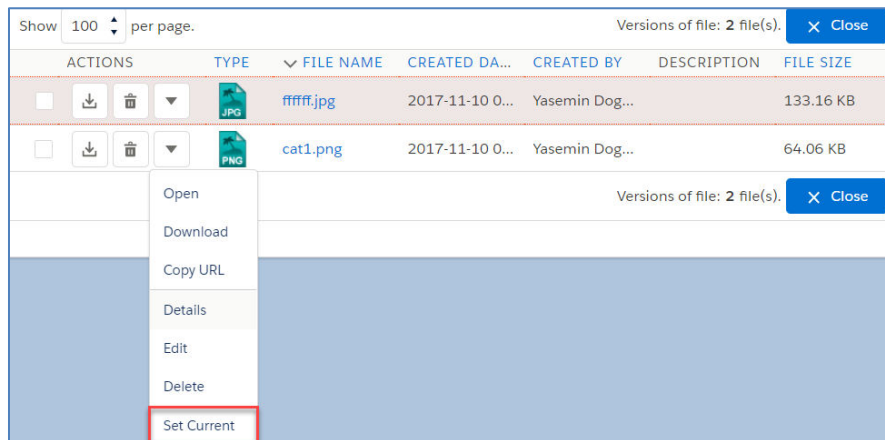


**Figure II-147**

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

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

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

---

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

1. **"Customizable Field Columns"** are used to display customizable fields (**Error! Reference source not found.**-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you will see, "Created Date", "Created By", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

![Notes icon] *Notes*

1. If your system administrator set a before delete trigger for your object you cannot delete an object which has object files attached. You'll get an error message if you try to delete this kind of object (Figure 121). You need to delete object files first, and then you can delete the object.



**Deletion problems**
**Test**
Back to Previous Page

There are object files attached to this object. You need to first delete object files manually and then delete the object!

**Figure II-148**

2. You can use "<Your Object Name> Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Admin Guide* and *S-Drive Customer Portal Guide* for more information), your customers can add object files to your objects using "Customer Portal Interface".

## FF.    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.

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- **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 122).



Figure II-149

**Item Actions**

1- **Downloading Files**

You can download a file by clicking **"Download"** item menu action under the "Item Actions" button (Figure 123).
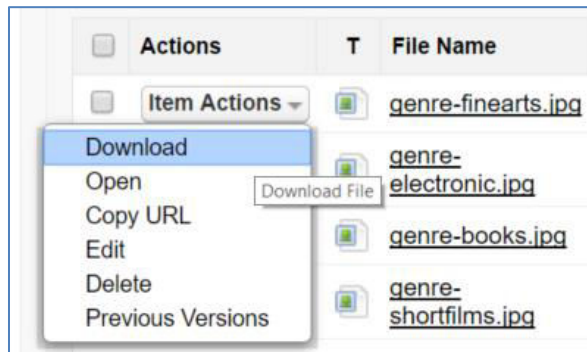
Figure II-150

**2- Opening Files**

You can open a file by clicking **"Open"** item menu action under the "Item Actions" button (Figure 124).
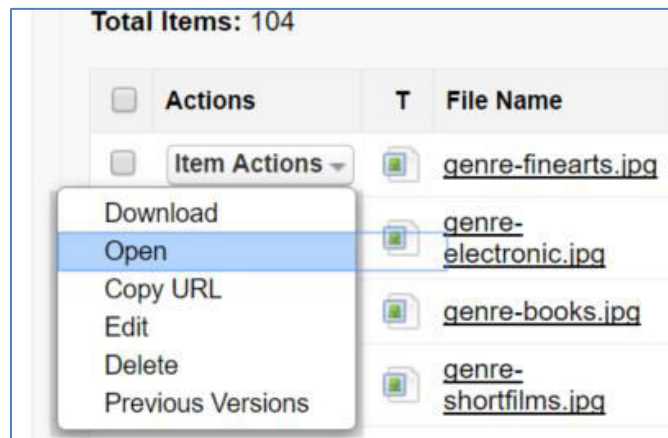


Figure II-151

**3- Copy URL**

You can Copy URL of a file by clicking **"Copy URL"** item menu action under the "Item Actions" button (Figure 125). After clicking Copy URL, you can select full URL and copy it (Figure 126).
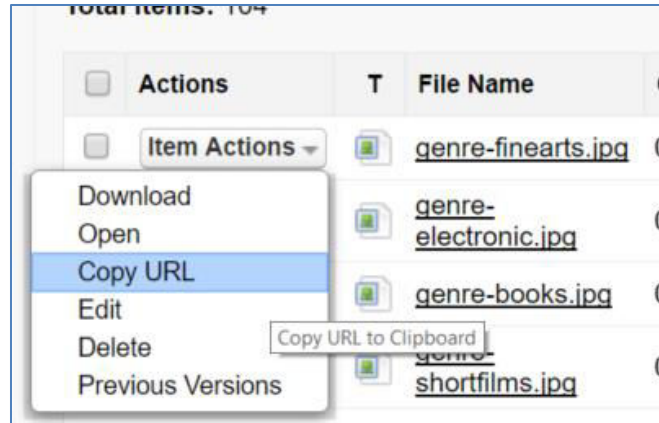
Figure II-152
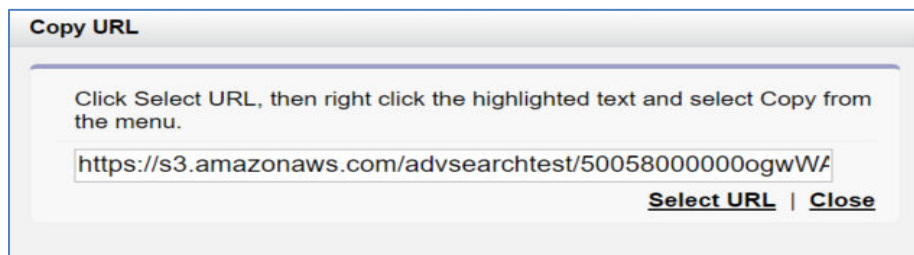


Figure II-153

## 4- Editing Files

You can edit a file by clicking **"Edit"** item menu action under the "Item Actions" button (Figure 127). After clicking Edit, you can edit Description of file and save it. (Figure 128).
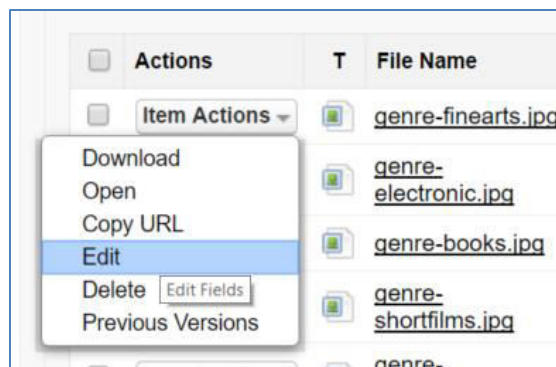


Figure II-154
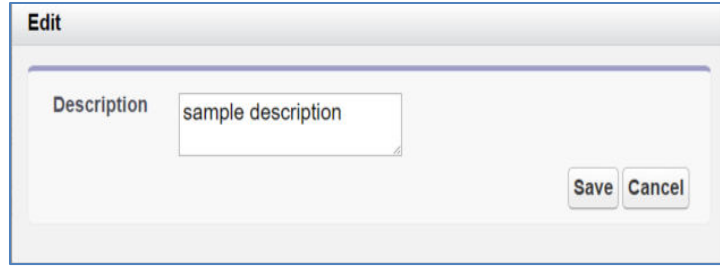
Figure II-155


*Notes*

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

**5- Deleting Files**

You can delete a file by clicking **"Delete"** item menu action under the "Item Actions" button (Figure 129).



Figure II-156


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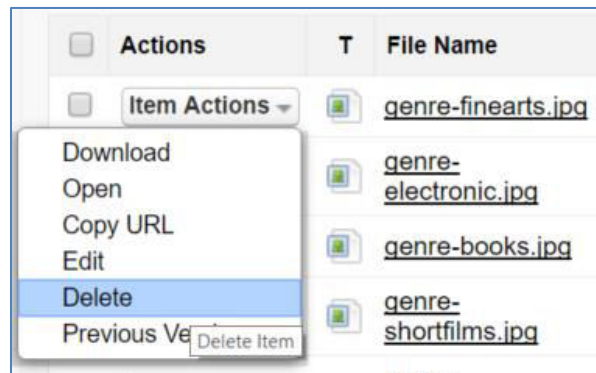
1. If versioning is enabled and if you delete latest version, all previous versions will also be deleted.

**6- Previous Versions**

You can display previous versions of files by clicking **"Previous Versions"** item menu action under the "Item Actions" button (Figure 130). After clicking on it, version history of the file will be listed (Figure 131).
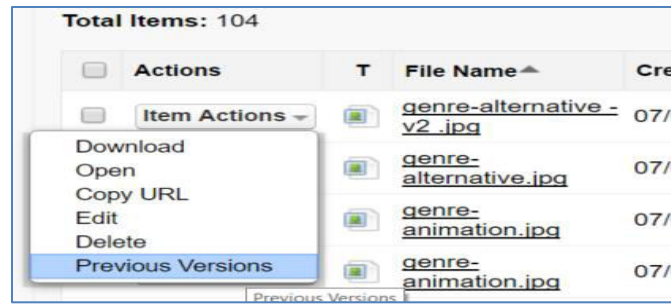
**Figure II-157**
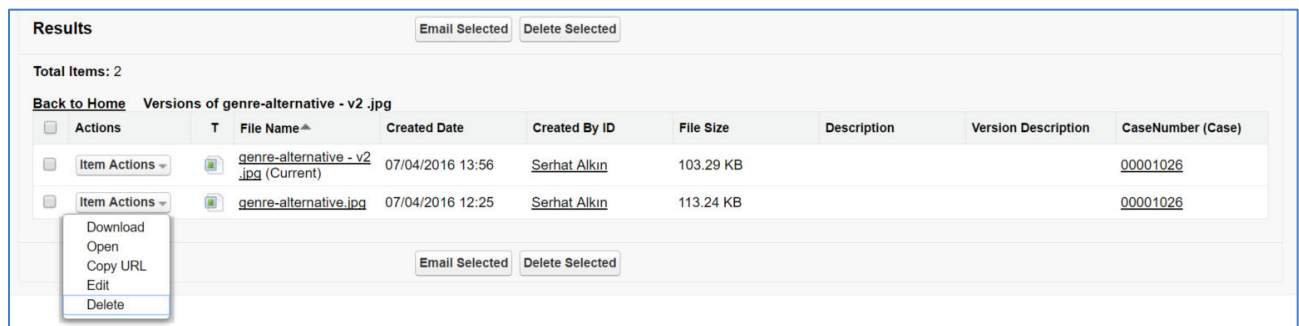


**Figure II-158**

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

*Notes*

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

**Email Selected and Delete Selected**

You can select one or multiple files by using checkboxes in results table and you can Email these files by clicking "Email Selected" button (Figure 132).

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 132).

Figure II-159

## 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 133). "Previous Versions" screen doesn't support "Folder Path" column.



Figure II-160

- **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 134);

# III. Mobile User Guide

From an object record page, such as an Account record, S-Drive will show in compact view with buttons for **Home, Upload, Create Folder**, and **navigate to Recycle Bin**. (Note that the trashcan icon is not a delete button. To delete, tap on the file, then tap the trash can icon from the detail view.)
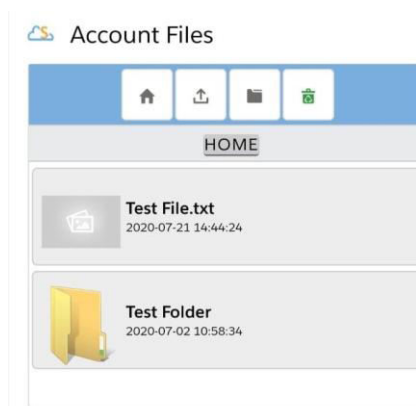
If you tap on a file, you will see the detail view. Here there are buttons for Download, Edit, Delete, Copy URL, and Email, as well as a Back button to take you back to the previous folder or to Home. You can also tap on the breadcrumbs above the preview image to navigate.
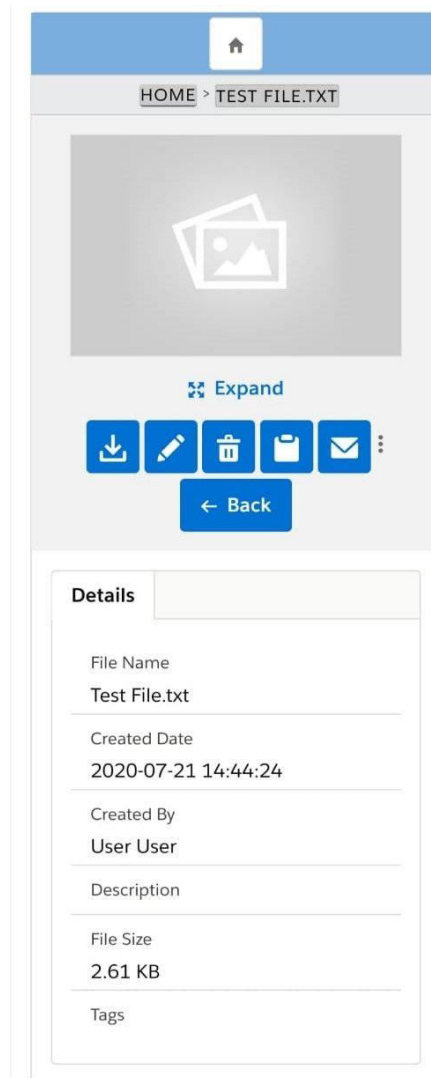


## IV.    S-DRIVE SUPPORT

You can contact S-Drive Support team for any questions or problems that you could not solve using S-Drive documents:

1. Open a Ticket at Support Site: sdriveapp.com/support

2. Send an Email to: sdrive@sdriveapp.com

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

www.sdriveapp.com