S-Drive

Installation Guide

v1.25

Important Note

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

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Contents

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

Figure 1

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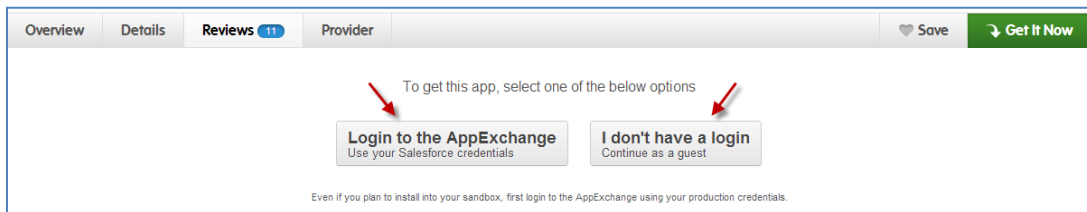

Figure 2

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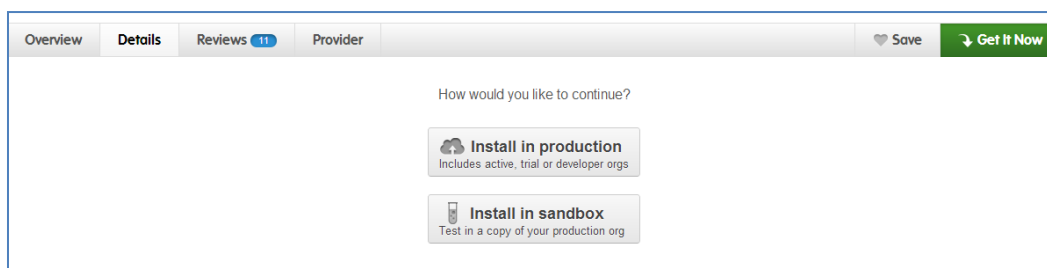

Figure 3

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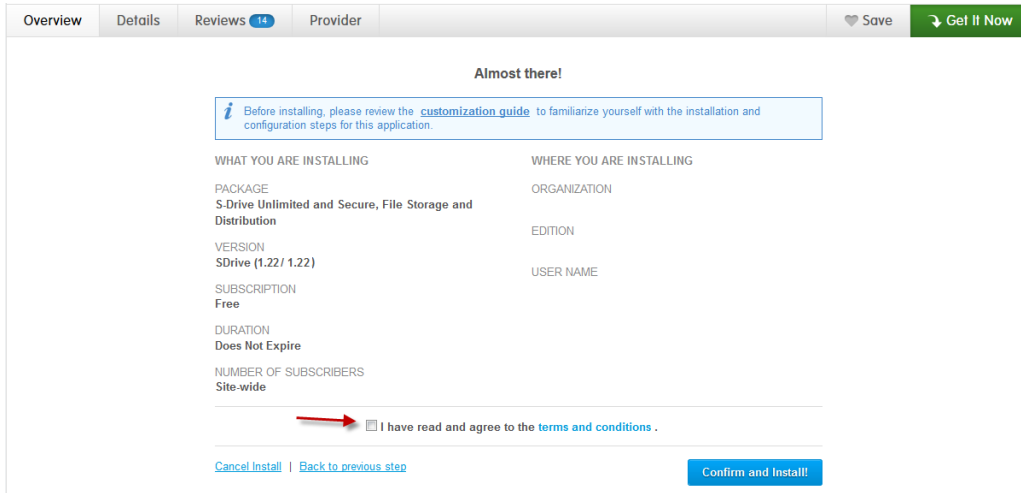

Figure 4

5. Login to your production (or sandbox organization based on your previous selections) account again in the next screen.

6. Review the **"Package Installation Details"** and **"Package Components"**. Click **"Continue"** (Figure 5).
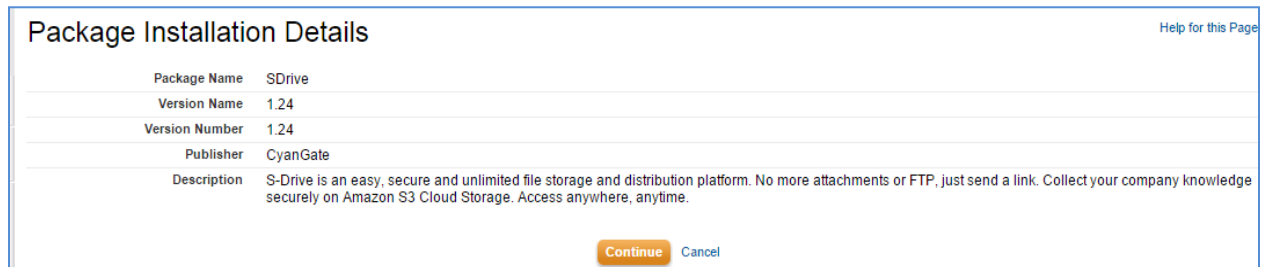

Figure 5

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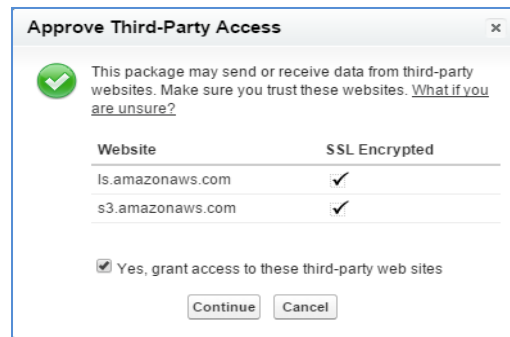
Figure 6

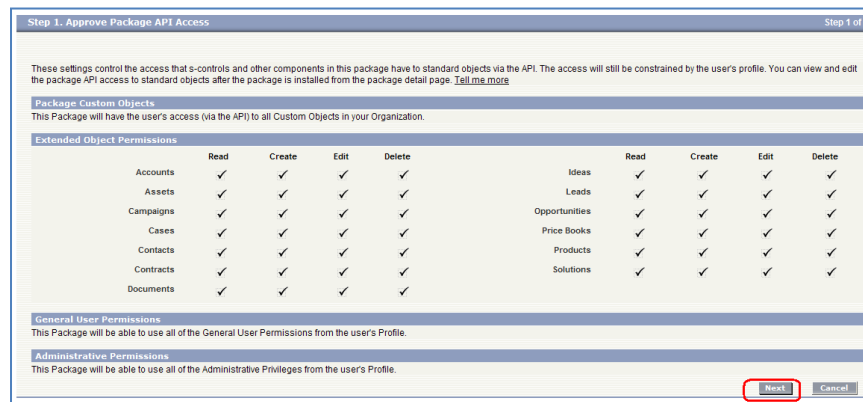8. Review **"Approve Package API Access"** details and click **"Next"** (Figure 7).

Figure 7

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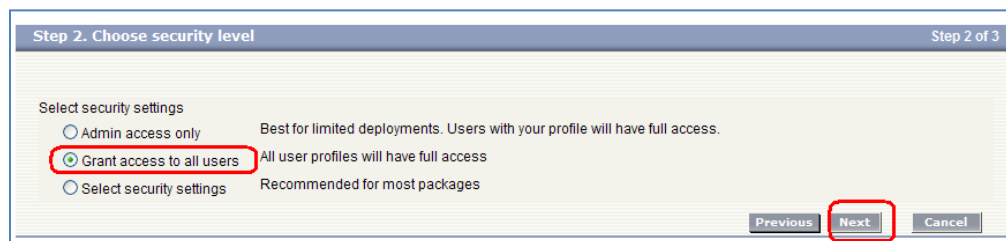

Figure 8

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

Figure 9

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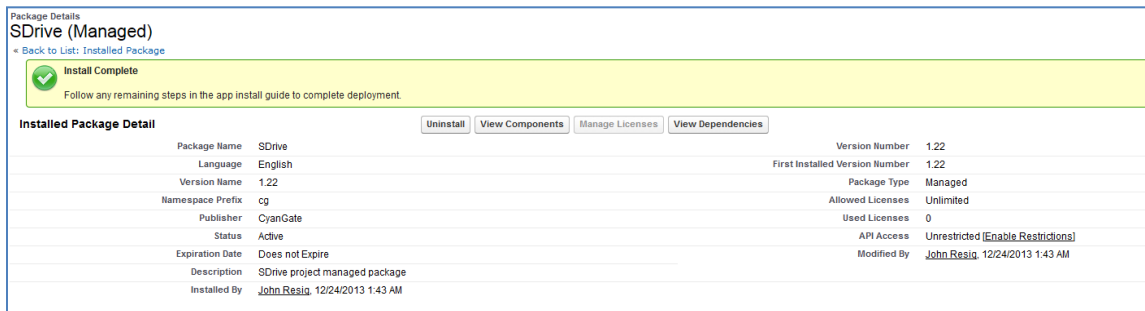

Figure 10

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

Figure 11

B. Displaying "S-Drive" and "S-Drive Configuration" Tabs

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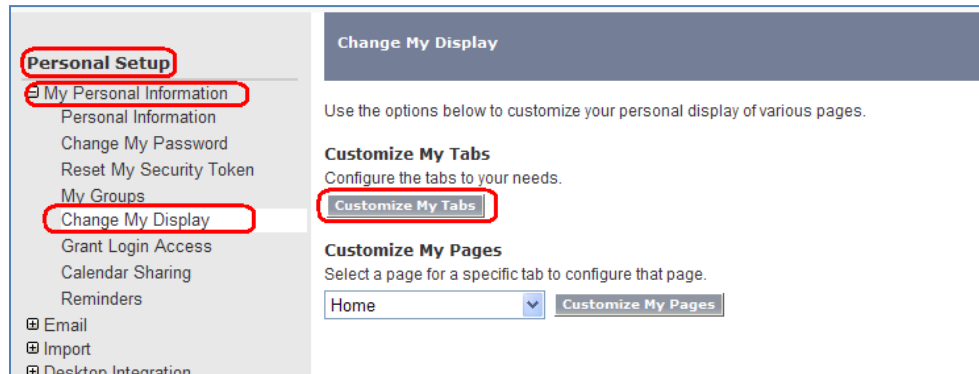

Figure 12

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

Figure 13

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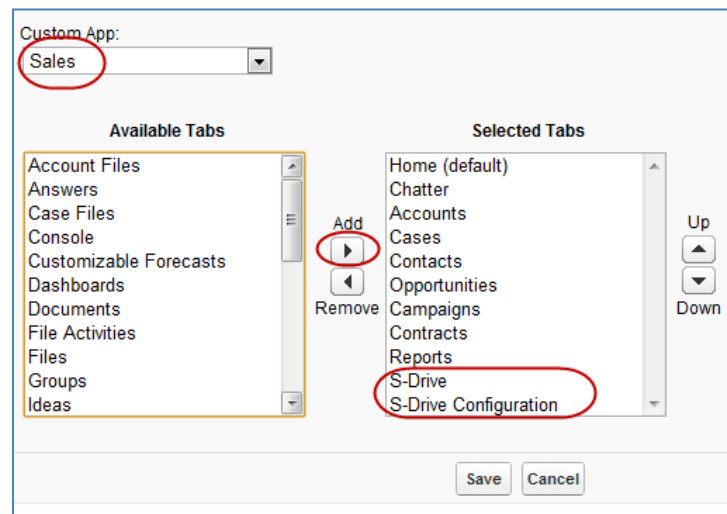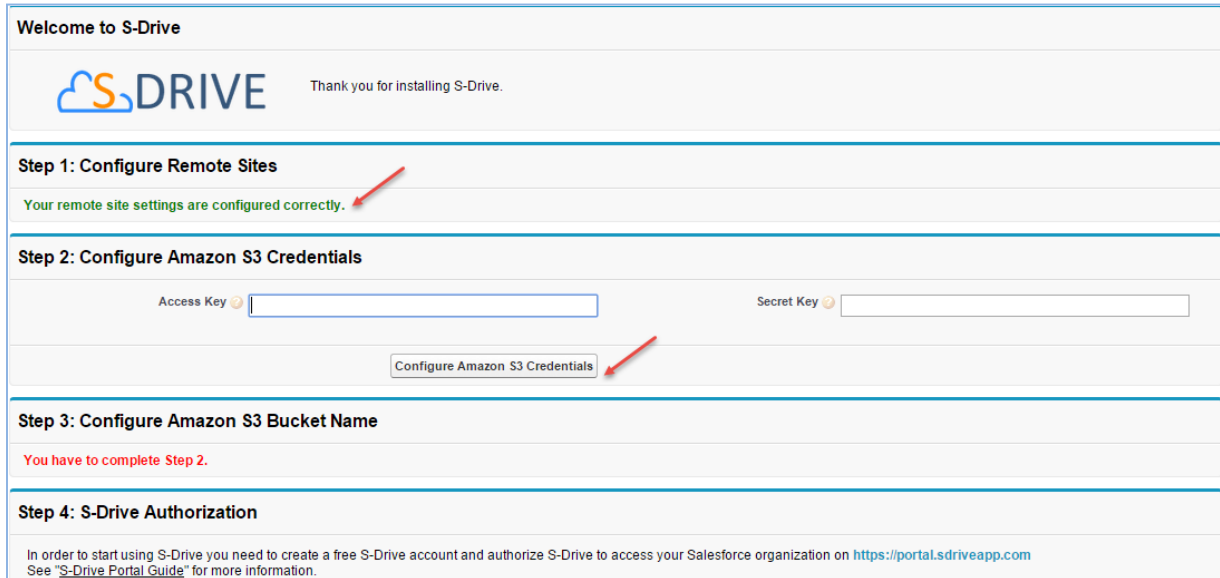
After completing installation and S-Drive tab configuration, click on the **"S-Drive"** tab.

1. **Step 1: Configure Remote Sites:** If Remote Site Settings are configured correctly (see Figure 6), you'll see **"Your remote site settings are configured correctly"** message under the **"Step 1: Configure Remote Sites"** section (Figure 14). If you see an error message in Step 1, resolve the issue by following the on-screen instructions (Figure 15).

Figure 14

Figure 15

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

Figure 16

Note

IAM users which assigned them individuals security credentials , must have some permissions to activate and use S-Drive.

 The minimum policy example is below:

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "s3:*"
            ],
            "Resource": [
                "arn:aws:s3:::sdrive-bucket/*"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:ListAllMyBuckets"
            ],
            "Resource": [
                "arn:aws:s3:::*"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:PutBucketCORS"
            ],
            "Resource": [
                "arn:aws:s3:::sdrive-bucket"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:GetBucketLocation"
            ],
            "Resource": [
                "arn:aws:s3:::sdrive-bucket"
            ]
        }
    ]
}
```

3. **Step 3: Configure Amazon S3 Bucket Name:** This is the bucket that will be used to store your files in your Amazon S3 account. Bucket name must be unique and must comply with DNS naming conventions.
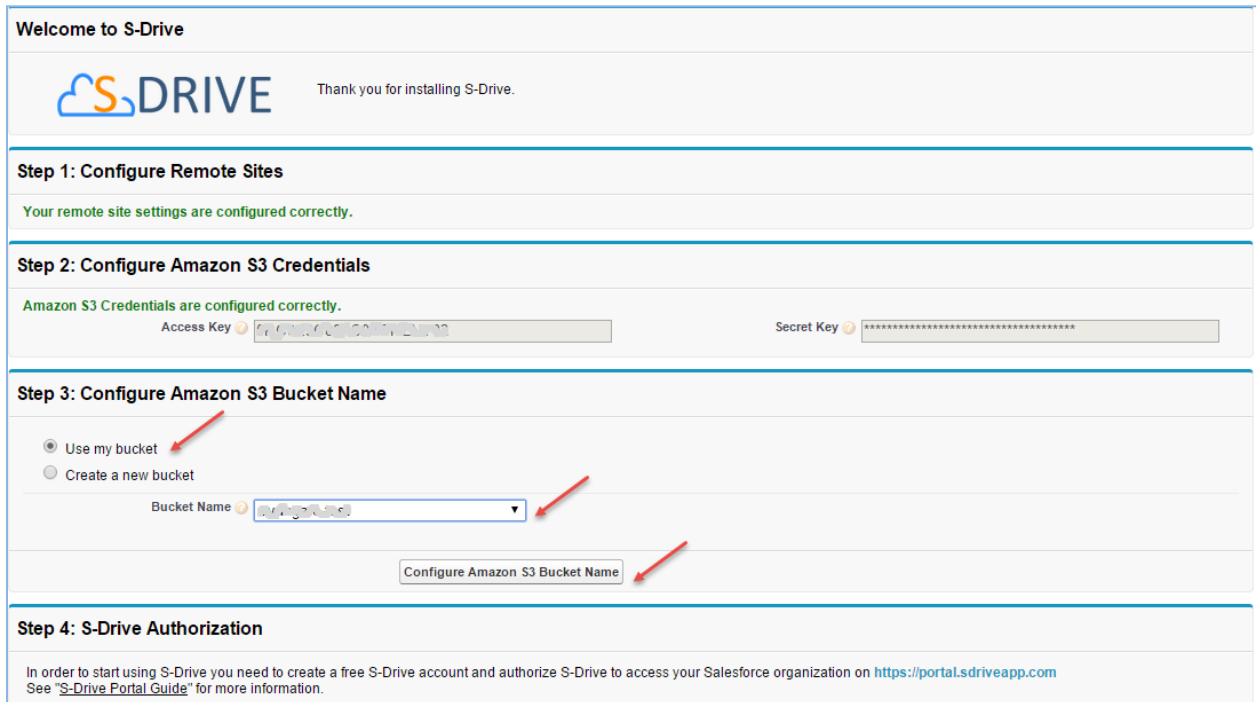
   You can select **"Use my bucket"** or **"Create a new bucket"** option.

   If you select **"Create a new bucket"** option (Figure 16), you need to provide a valid bucket name and select the region name to create the bucket on this endpoint location.

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

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

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

Welcome to S-Drive

S DRIVE   Thank you for installing S-Drive.

Step 1: Configure Remote Sites

Your remote site settings are configured correctly.

Step 2: Configure Amazon S3 Credentials

Amazon S3 Credentials are configured correctly.

Access Key [_____]   Secret Key [**]

Step 3: Configure Amazon S3 Bucket Name

    ⦿ Use my bucket
    ◯ Create a new bucket

Bucket Name [_____ ▼]

[Configure Amazon S3 Bucket Name]

Step 4: S-Drive Authorization

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com
See "S-Drive Portal Guide" for more information.

Figure 17

Step 1: Configure Remote Sites

Your remote site settings are configured correctly.

Step 2: Configure Amazon S3 Credentials

Amazon S3 Credentials are configured correctly.

Access Key ⓘ [_____]   Secret Key ⓘ [**]

Step 3: Configure Amazon S3 Bucket Name

Amazon S3 Bucket Name is configured correctly.

Bucket Name ⓘ [_____]

Step 4: S-Drive Authorization

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com
See "S-Drive Portal Guide" for more information.

Figure 18

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

D. S-Drive Attachments for Accounts, Cases, Contacts and Opportunities

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

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

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

Figure 19

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

Figure 20

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

Figure 21

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

Figure 22

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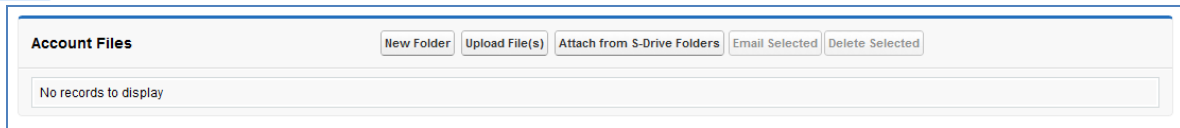
Upgrading less than 1.24 versions to S-Drive 1.25 is not possible. This version is only for new customers. S-Drive 1.26 will be released for migrating and upgrading previous versions.

F. S-Drive Advanced Configuration

Everything you need to start using S-Drive is in "**S-Drive Installation Guide**" and advanced topics for installation/configuration are in "**S-Drive Advanced Configuration Guide**".

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

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

G. Troubleshooting Tips

1. **[Problem]** I'm getting *"Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://ls.amazonaws.com/?......."* error.
    [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: ***https://ls.amazonaws.com***

2. **[Problem]** I'm getting *"Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://s3.amazonaws.com/?......."* error.
    [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: ***https://s3.amazonaws.com***

3. **[Problem]** My mail message contains *"????"* for some language-specific characters in email clients (Outlook, Thunderbird etc.).
    [Solution] Go to **Setup -> Personal Setup -> My Personal Information -> Personal Information**. Edit **User Detail** and set **Email Encoding** to **Unicode (UTF-8)**.

4. **[Problem]** Salesforce sharing is not working.
    [Solution] In **version 1.25** sharing is **only** supported for **S-Drive Folders**. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.

5. **[Problem]** Percent character (%) is replaced with an underscore character (_) while downloading.
    [Solution] This is a technical limitation.

6. **[Problem]** Some special characters (e.g. ğ, ş, ı) can't be typed into text fields on Apple Macintosh.
    [Solution] This is a limitation related to Flash Player's Macintosh version. This issue will be addressed in later releases.

7. **[Problem]** Special characters in file names are URL encoded for Firefox browser.
    [Solution] This is a limitation of Firefox.

8. **[Problem]** If a sub folder is deleted parent folder's (+) sign stays there until clicked Home and refreshed.
    [Solution] You need to refresh the S-Drive tab.

9. **[Problem]** If folder has no sub folders, tree's folder icon is closed whether we click on it or not.
    [Solution] This is only a visual problem and it will not affect the operation of the application.

You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:

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

2. Email: sdrive@sdriveapp.com

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