S-Drive
User Guide
v1.25

Important Note

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

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Contents

A. S-Drive Folders Screen

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

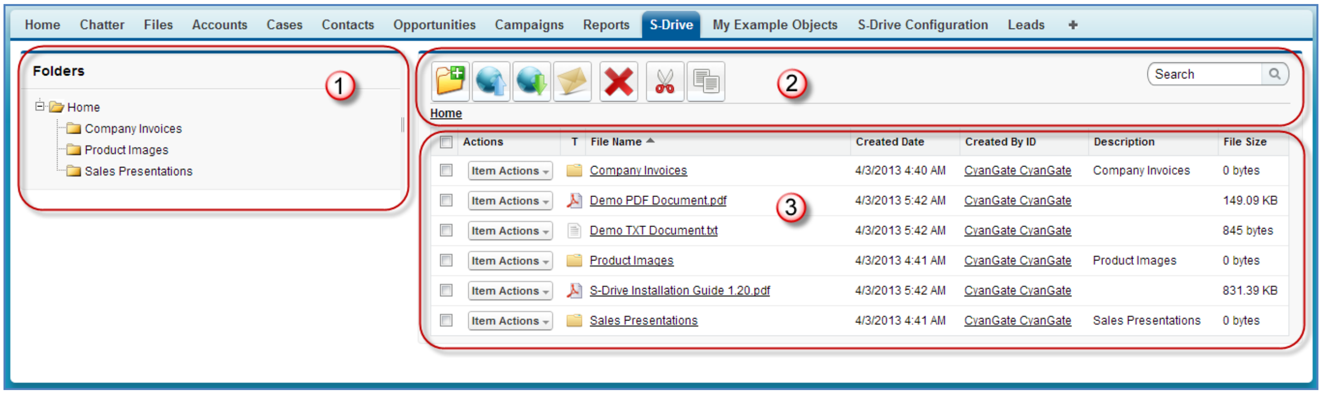


Figure 1

1. Folders

Left panel (Figure 1-1) is the **"Folders"** panel. It displays your account's folder structure. Your home folder is named as **"Home"** and your files and folders are listed in a hierarchical way. You can click on a folder name to display its contents in the right pane. If a top-folder has sub-folders under it, it will have a plus sign (**+**) next to its name. After opening that folder, plus sign becomes a minus sign (**-**). You can open-close folders using these signs also.

2. Toolbar

Top panel (Figure 1-2) is the **"Toolbar"** panel. It displays several buttons, search box and current folder information holder. Items in the toolbar usage can be summarized as shown in Figure 3.

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

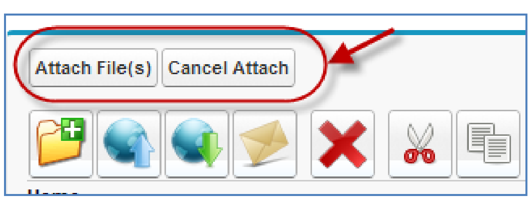


Figure 2

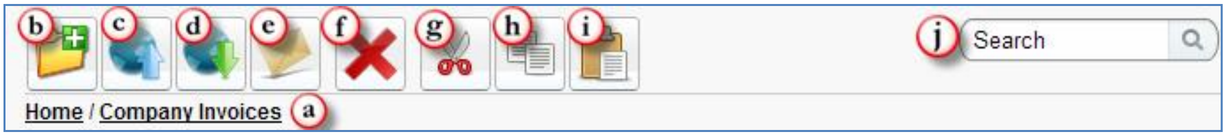


Figure 3

(a) **"Current Folder Information Holder"** keeps the current folder information. For example if you are under *"Home/Company Invoices"* folder, the location information will be displayed in this area (Figure 3-a). You can click any level to drill down to that subfolder. Once a search is performed, search results are displayed in "Search Results View" and "Current Folder Information Holder" becomes "Back to Home" link (Figure 4). You can click to this link to go back to Home page.

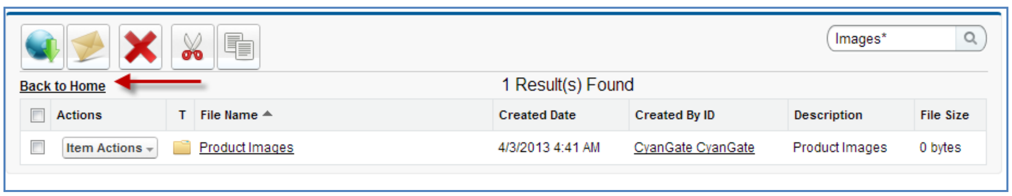


Figure 4

(b) **"Create Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 3-b). This item is not displayed for the "Search Results View".

(c) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 3-c). This item is not displayed for the "Search Results View".

(d) **"Download File(s)"** button is used to open 'Download Manager'. See "Downloading Files" section for more information (Figure 3-d).

(e) **"Send Email"** button is used to email files. See "Emailing Files" section for more information (Figure 3-e).

(f) **"Delete File(s)"** button is used to delete file(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 3-f).

(g) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 3-g).

(h) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 3-h).

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

(j) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 3-j).

3. Current Folder View / Search Results View

Right pane (Figure 1-3) is the **"Current Folder View"** by default. Files and sub-folders which belong to the current folder are listed here. If a search is performed this view is changed to "**Search Results View**" and search results are displayed inside the pane. Let's review the details of this pane (Figure 5):

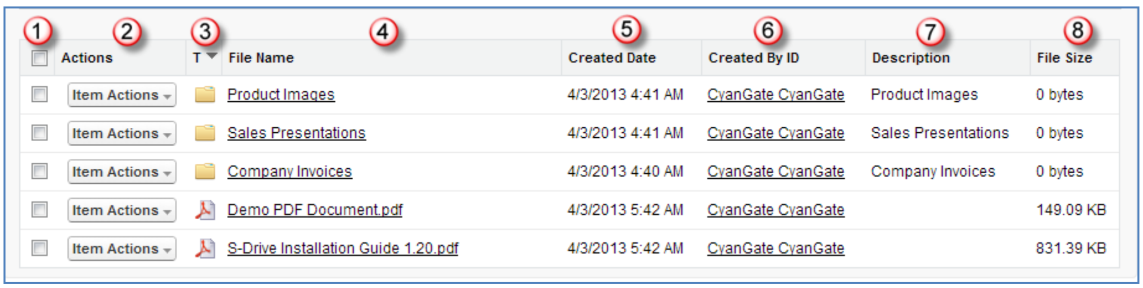


Figure 5

(1) First column contains **"Select All"** and **"Select Single Item"** check box options. This column is used to select items for multiple processing (download, email, delete, cut, copy). You can select items by clicking checkboxes (Figure 5-1).

(2) **"Actions"** column is used to display action buttons (Figure 5-2). Based on the sharing settings, you can see **"Item Actions"** button inside the Actions column. Once you click the button, you'll see a dropdown menu under the button. Let's review the details about these item actions (Figure 6):

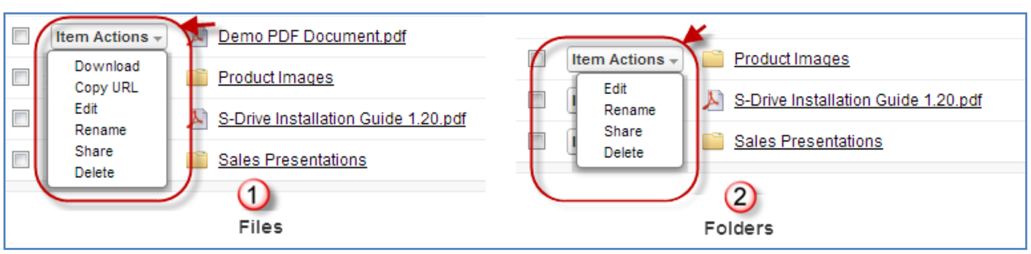


Figure 6

(a) **Download**: This option is displayed only for files. You can download the selected file by selecting this action menu item (Figure 6-1). See "Downloading Files" section for more information.

(b) **Copy URL**: This option is displayed only for files. You can copy the file download URL to the clipboard (Figure 6-1). See "Copying URL to Clipboard" section for more information.

(c) **Edit**: This option is displayed for both files and folders. You can edit file/folder description by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Editing File/Folder Description" section for more information.

(d) **Rename**: This option is displayed for both files and folders. You can rename file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Renaming Files & Folders" section for more information.

(e) **Share**: This option is displayed for both files and folders. You can share file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Sharing Files & Folders" section for more information.

(f) **Delete**: This option is displayed for both files and folders. You can delete selected file/folder by clicking this action menu item (Figure 6-1 and Figure 6-2). See "Deleting Files" and "Deleting Folders" sections for more information.

(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 5-3).

(4) **"File Name"** column is used to display file names (including file extensions) and folder names. You can sort by file name alphabetically ascending or descending by clicking the column header (Figure 5-4).

(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 5-5).

(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 5-6).

(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 5-7).

(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 5-8).

B. Creating Folders

You can create folders by clicking "Create Folder" button in the toolbar (Figure 3-b). 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 7):

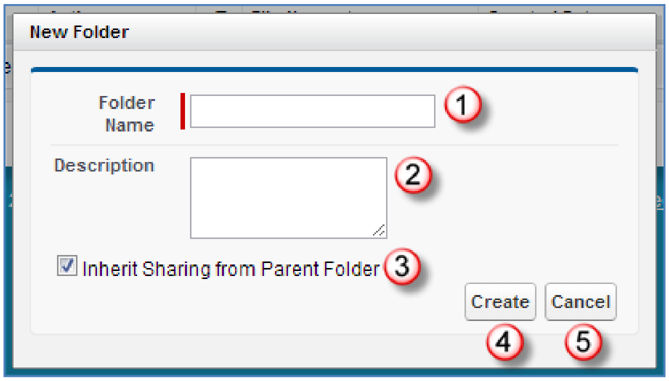


Figure 7

(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 7-1).

(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 7-2).

(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 7-3). 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 7-4).

(5) "Cancel Button": If you decide not to create a folder, you can click Cancel button. Operation will be canceled and you'll return back to the S-Drive Folders screen (Figure 7-5).

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(Figure 8):
   - *'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.

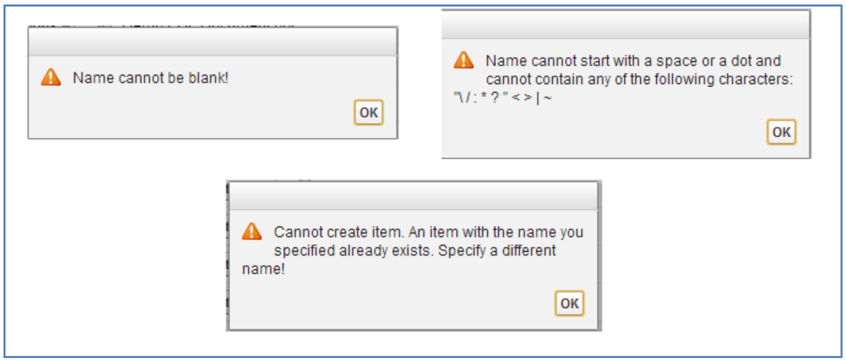


Figure 8

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.

C. Uploading Files

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 3-c). 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, based on your configuration a new pop-up screen or inline upload widget will be opened as shown in Figure 9 (Html Upload Widget), Figure 10 (Flash Upload Widget) and Figure 11 (Java Upload Widget).

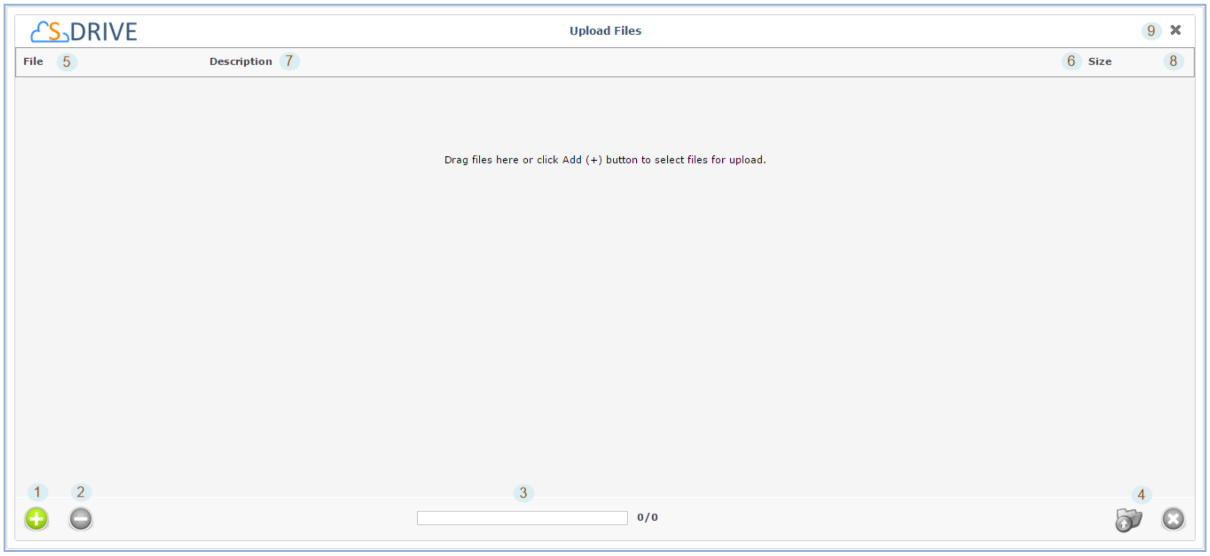


Figure 9

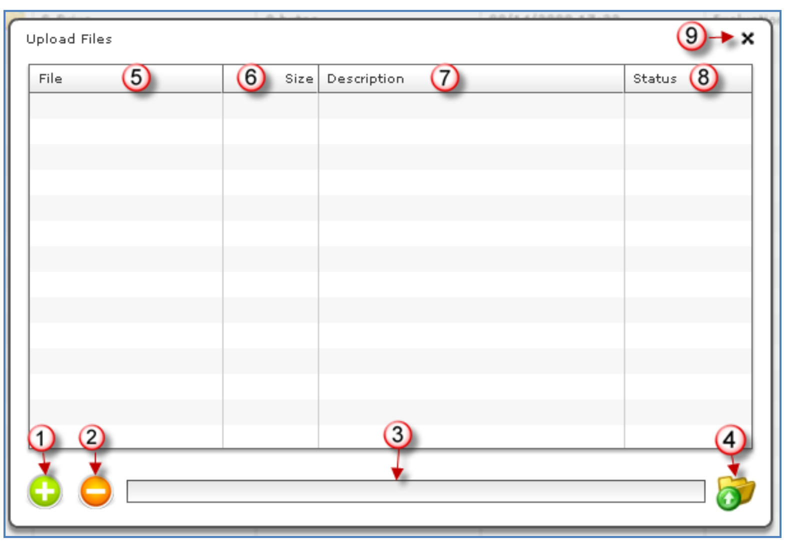


Figure 10

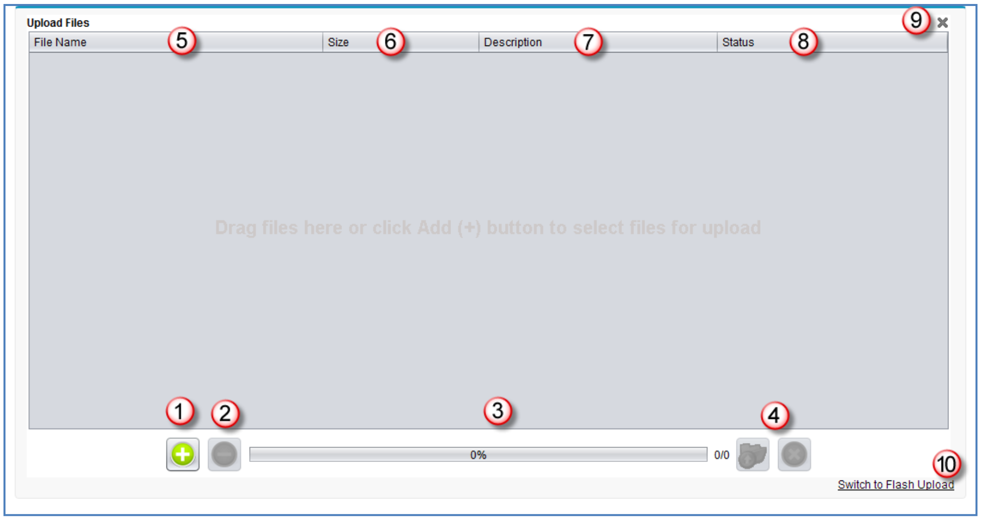


Figure 11

(1) "Add file(s) Button": You can add files to the upload list by using this button (Figure 9-1, Figure 10-1 and Figure 11-1). After clicking the (+) sign, "Select file(s)" screen will be opened (Figure 12).

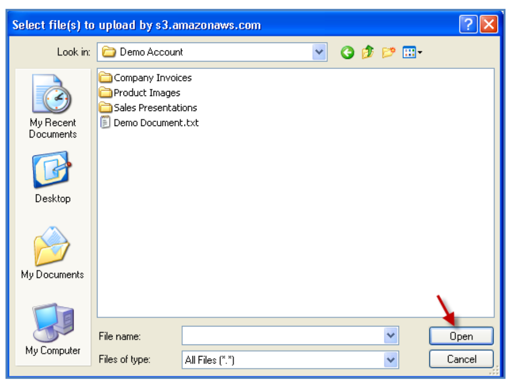


Figure 12

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 (Figure 9-2, Figure 10-2 and Figure 11-2).

(3) "Upload Progress Bar": This progress bar displays the upload information after clicking the "Upload file(s) Button" (Figure 13, Figure 10-3 and Figure 14).

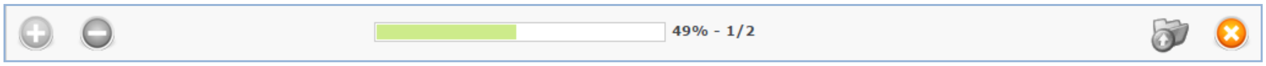


Figure 13

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 14

For Flash Upload Widget, percentage of the progress (i.e. 19%) and the order of the file being uploaded (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.)

For Java Upload Widget it does not display the percentage of the progress for small file uploads (5 MB, configurable), instead it displays "Uploading" message as shown in Figure 15.

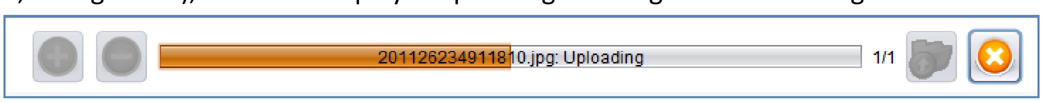


Figure 15

(4) "Upload file(s) Button": After selecting the files to be uploaded and editing their description, you can click this button, to start uploading files. "Upload file(s) Button" will change to "Cancel Upload Button" while upload is in progress. You can cancel the upload any time by clicking this button. If you cancel the upload, the current file which is being uploaded will be canceled. For example, if you select five files to upload and after uploading two files you decide to cancel the upload process, first two files will be uploaded but the process will be canceled after third file. There is also another possibility for the files that it may fail. Failing the upload for a file won't impact other file uploads, but it will be noted that it "FAILED" in the status column of the upload list after the upload completed. If you click to the "Upload file(s)" button after a failure or cancellation, "COMPLETED" files in the upload list will be skipped for this iteration and only unprocessed, failed or canceled items will be uploaded (Figure 10-4).

(5) "File Column": This column displays the names of the files to be uploaded (Figure 9-5, Figure 10-5).

(6) "Size Column": This column displays the sizes of the files to be uploaded (Figure 9-6, Figure 10-6).

(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 16, Figure 10-7 and Figure 17).

Figure 16

Notes

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

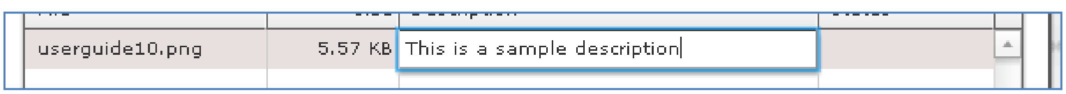


Figure 17

(1) "Status Column": This column displays the status of the files which are being uploaded (Figure 9-8, Figure 10-8 and Figure 19). For Html Upload, There are five possible scenarios: ***Queued***, ***Uploading***, ***Multipart Processing***, ***Done*** and ***Failed*** (Figure 18).

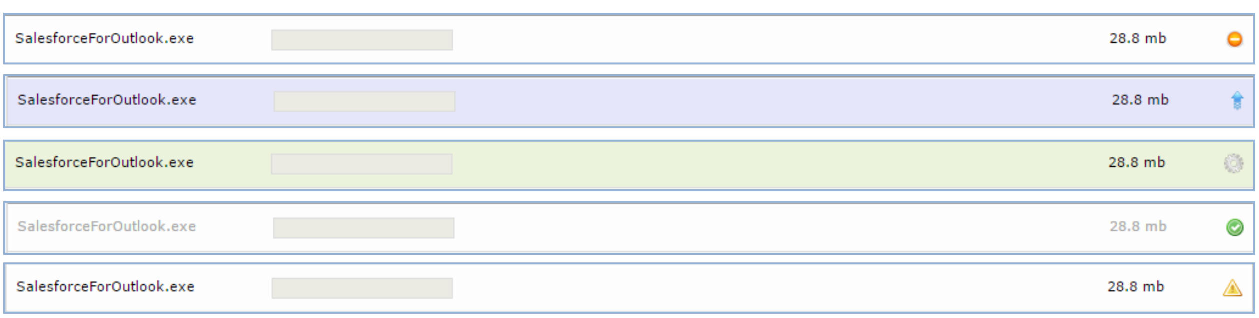


Figure 18

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

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

File	Size	Description	Status
userguide02.png	60.24 KB		COMPLETED
userguide01.png	14.67 KB		COMPLETED
Adobe® Flex® 3.0 For	5.65 MB		

Figure 19

There are three possible scenarios: COMPLETED, CANCELED, and FAILED for Java and Flash Upload.

- COMPLETED means, current file in the list is successfully uploaded to the S-Drive.
- FAILED means, current file failed to upload. This may happen because of a system problem or also if you select "No" for the "Overwrite file?" question.
- CANCELED means, user canceled the upload operation. Current file and the files after the current file were not uploaded to the S-Drive.

For Html Upload and Java Upload Widget, 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 (Figure 9-9, Figure 10-9).

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 20). 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 and Java Upload Widget, there are four possible answers: Yes, No, Yes to All, No to All .

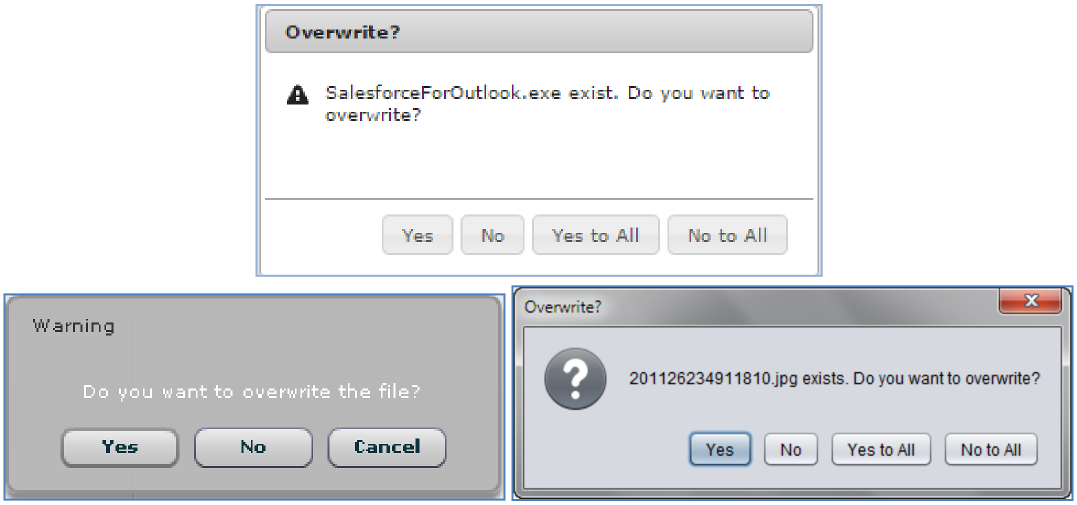


Figure 20

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

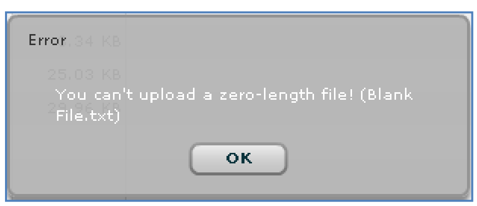
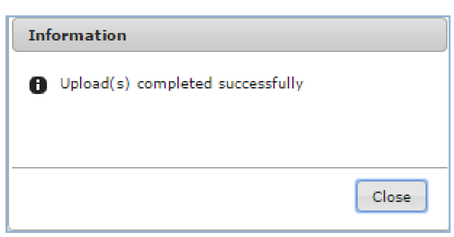


Figure 21

3. After processing the upload list, you'll be informed by saying *"Upload(s) completed successfully"* if list is processed without any errors (Figure 22). After clicking OK button, upload screen will be closed and the current folder will be refreshed.



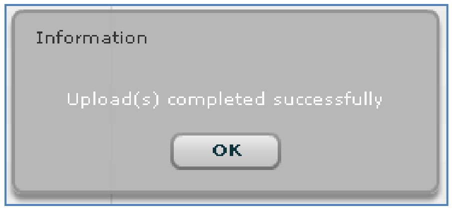


Figure 22

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).

6. Java Upload Widget currently does not support custom object fields (only standard fields like File Name, File Size, Description, Created By, Created Date). So, you need to edit these field values after uploading files.

D. Deleting Files

There are two possible ways to delete files: "Single File Deletion" or "Multiple File Deletion". Note that "Deleting Folders" will be handled in a different topic.

1. Single File Deletion

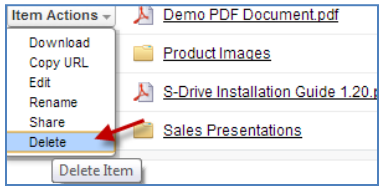


Figure 23

To delete a file, click the "Item Actions" button in the *"Actions"* column of the selected file and select "Delete" item menu action from the dropdown menu (Figure 23). Using this method you can delete files one by one. After clicking the "Delete File" item action menu you'll be asked if you are sure (Figure 24).

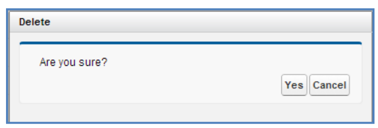


Figure 24

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

2. Multiple File Deletion

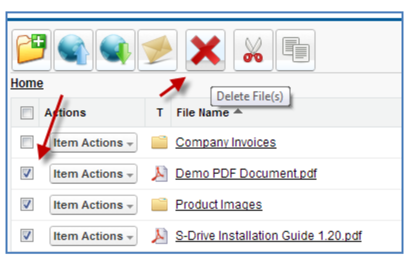


Figure 25

To delete multiple files at a time, select files and then click the "Delete File(s)" button in the toolbar of the S-Drive application (Figure 25). Using this method you can delete multiple files at a time. After clicking the "Delete File(s)" button you'll be asked if you are sure (Figure 24). Select "Yes" to delete selected files, "Cancel" to cancel delete operation.

E. Deleting Folders

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

- You cannot delete a folder which contains files.

- You cannot delete a folder which contains sub-folders.

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

If you try to delete a folder which contains items in it; you'll get *"You cannot delete this file at this time: There are sub files in one or more of the selected folders, please delete the sub files first before deleting the folders! "* warning message (Figure 26). You need to first delete items under this folder, and then you can delete that folder. Besides that delete operation can be applied same as written in “Deleting Files” section.

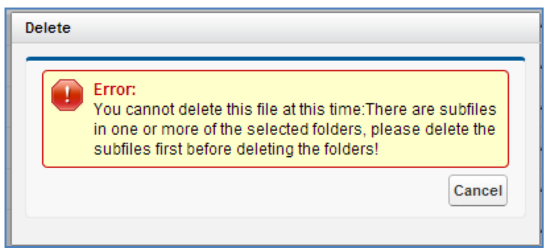


Figure 26

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

Notes

1. If you click toolbar's "Delete File(s)" button without selecting any file, you'll get a warning message saying *"Please select file(s) for deletion"* (Figure 27).

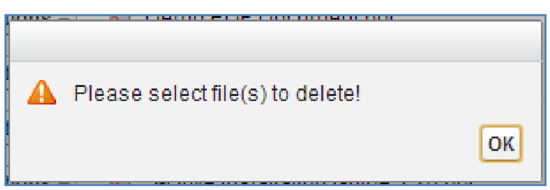


Figure 27

2. 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 28) 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.

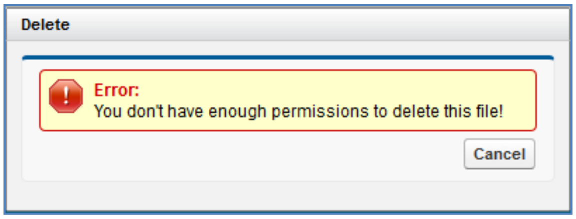


Figure 28

F. Emailing Files

Emailing files is very easy using S-Drive. You can email any number of files at a time. S-Drive does not attach files to emails; it adds links to the files at the bottom of the email message. You can set the expiration time for these links also. So, you and your email recipients don't have to wait for sending/downloading large attachments. They'll just click the link in the email and they'll download attachments directly from source in a secure and fast way. You can use email templates in your organization. Let's see how this can be done (Figure 29). 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).

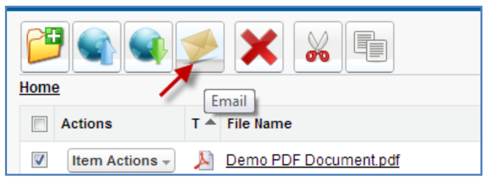


Figure 29

Email Files screen contains many features (Figure 30). Let's review the details of the fields in this screen:

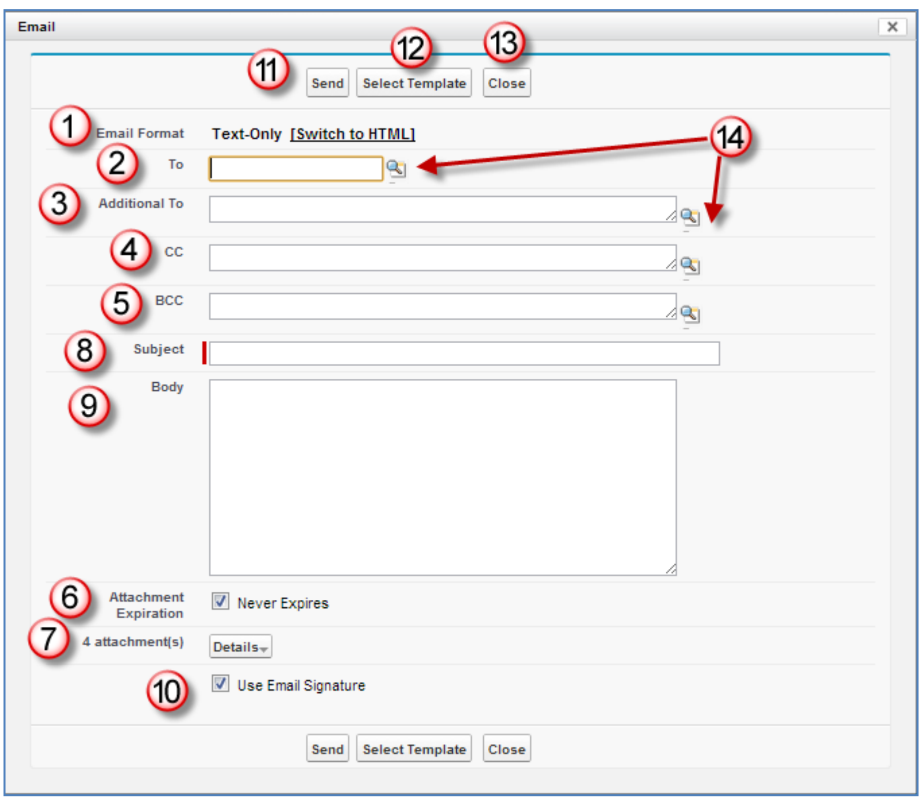


Figure 30

(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 30-1).

(2) "To...": The main recipient of the email (Figure 30-2). 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 30-14) 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 31). If you decide to change or remove the "To..." recipient of the email you can clear this field. "Lookup" button is not available for Customer Portal users.

This field is used just for sending email to Salesforce contacts. Other recipients can be added to "Additional To...", "CC..." and "BCC..." fields. Also note that the email message is added to the Activity History of the Salesforce.com contact. You can access activity history of a contact from his contact page under Salesforce.com Contacts tab. See *S-Drive Advanced Configuration Guide* for enabling Activity History for standard and custom objects.

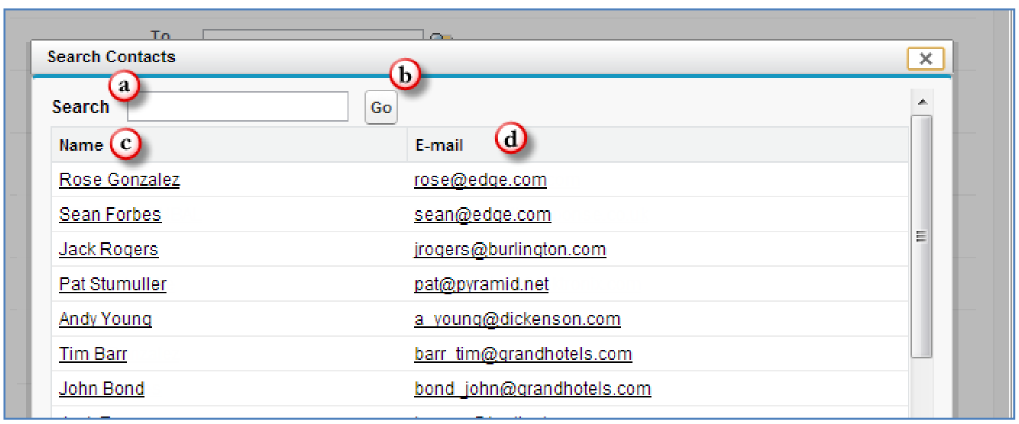


Figure 31

***Important Note**: For Contact, Account, Case and Opportunity S-Drive Attachments, "To" field is auto-filled with related contact information, if available. You can configure this option for custom objects using "S-Drive Advanced Configuration Guide – Creating Custom Object Files" section.*

(a) "Search Criteria": Type in the search criteria in this field. S-Drive searches over name, last name and email fields for the typed keyword after clicking the "Go" button or pressing the Enter key. You can leave it blank and press "Go" button to search across all of your contacts (Figure 31-a).

(b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 31-b).

(c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 31-c).

(d) **"Email Column"**: Results' emails will be displayed in this column (Figure 31-d).

(3) "Additional To...": You can add additional mail recipients here. For multiple email recipients you need to comma-separate them. Also you can click the "Lookup" button (Figure 30-14) to select recipients from Salesforce contacts (Figure 30-3). "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 30-14) to select recipients from Salesforce contacts (Figure 30-4). "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 30-14) to select recipients from Salesforce contacts (Figure 30-5). "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 30-6). 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 32). 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.

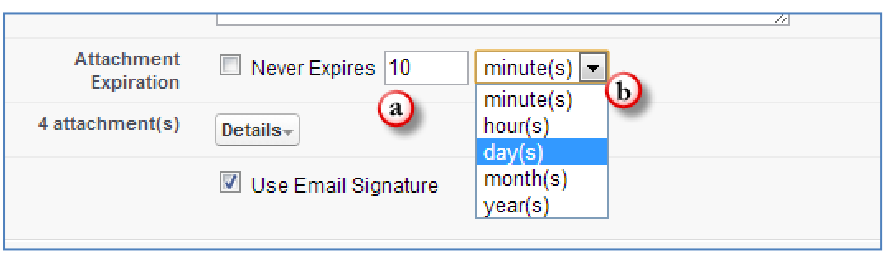


Figure 32

(a) "Number Field": Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 32-a). For this field just 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 32-b).

(7) "Attachment Details": This section gives information about attached files (Figure 30-7). 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 33).

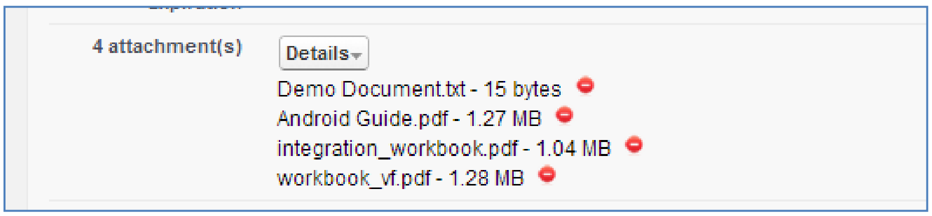


Figure 33

(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 30-8).

(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 30-9).

(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 30-10). "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 30-11). 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 34).

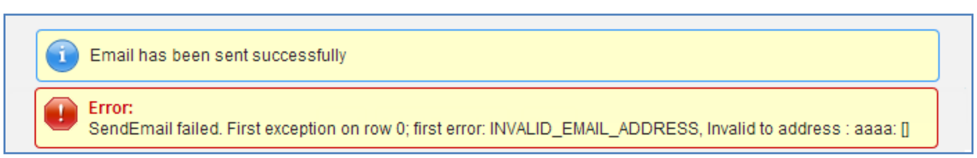


Figure 34

(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 35). 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.

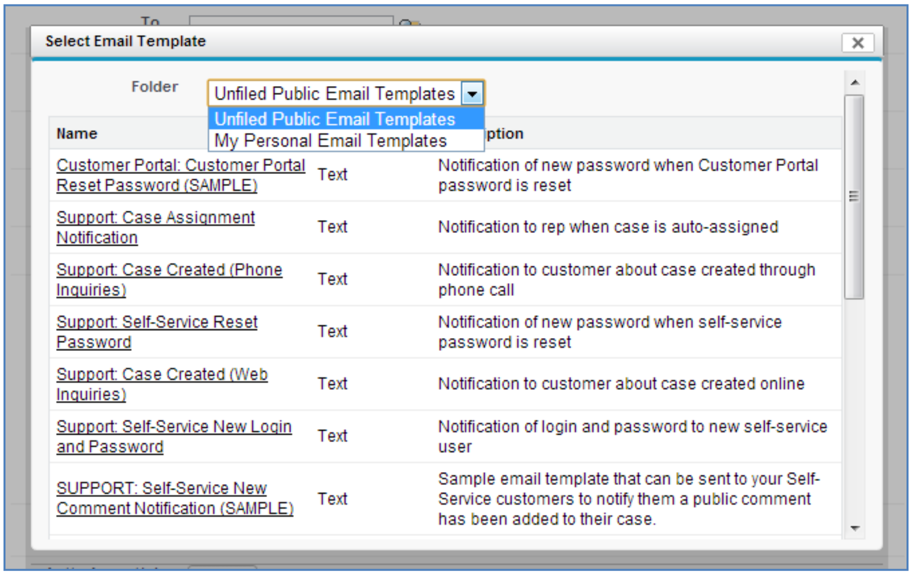


Figure 35

(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 30-13).

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 36).

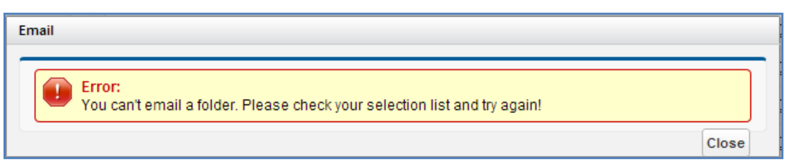


Figure 36

G. Downloading Files

There are two ways of downloading files in S-Drive: **"Browser Controlled One Click Download"** and **"Download Manager Download"**. To enable "Download Manager Download" your organization's system administrator must enable it from "S-Drive Configuration" page.

1. Browser Controlled One Click Download

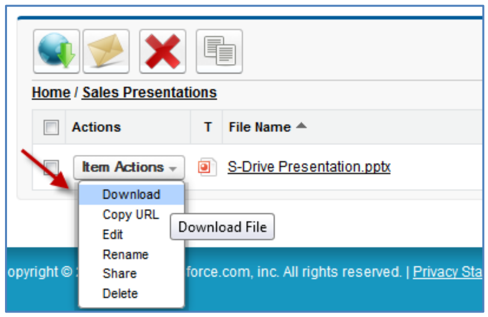


Figure 37

You can download individual files by clicking **"Download"** item menu action from the "Item Actions" button (Figure 37). "Download" item menu action is only available for files. Download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) (Figure 38).

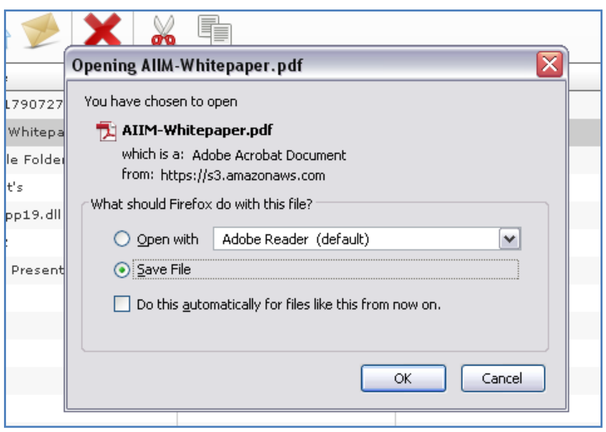


Figure 38

2. Download Manager Download

To use "Download Manager", your organization’s “System Administrator” needs to enable it from "S-Drive Configuration" screen. Read *"S-Drive Advanced Configuration Guide"* for more information.

If "Download Manager" is configured in your organization, you should see the "Download File(s)" button in "S-Drive Folders" toolbar (Figure 39).

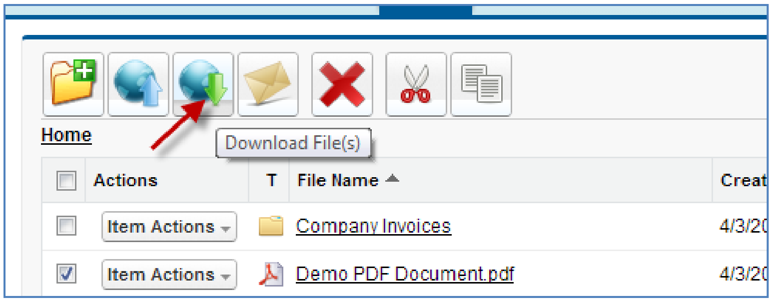


Figure 39

Select some files and click Download Manager to start the downloads. A popup screen will be opened and downloads will progress. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen. Once the download is finished you can open the downloaded file by clicking "Open" button on the right of the file. Also you can add more downloads when "Download Manager" screen is open. Newly added files will be added to the list and the new downloads will start immediately (Figure 40).

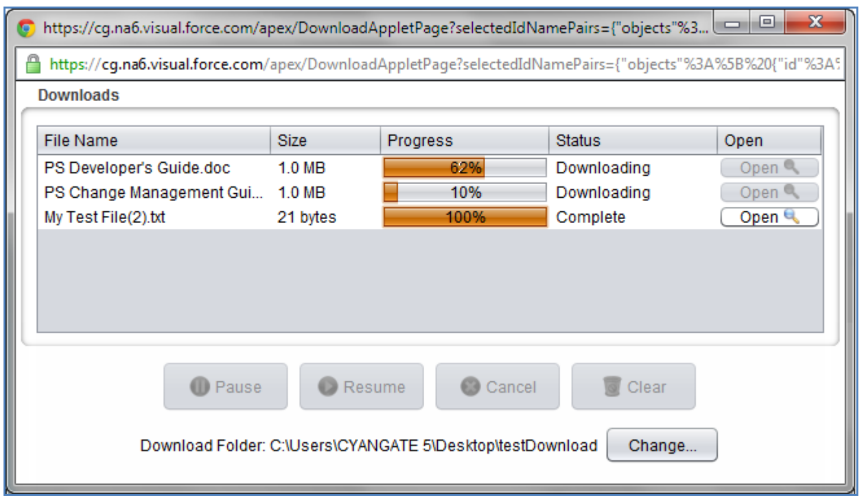


Figure 40

If you try to add a file that is currently in the download list, you'll get a warning message (Figure 41):

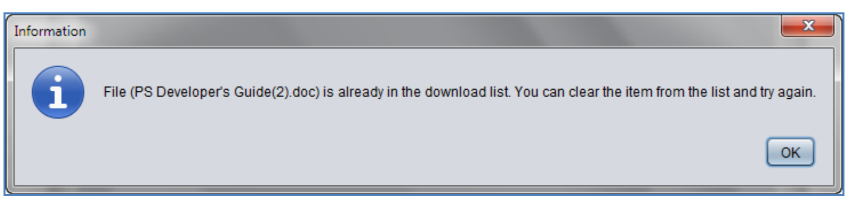


Figure 41

You cannot download folders. If you try to download a "folder", you'll get an error message (Figure 42):

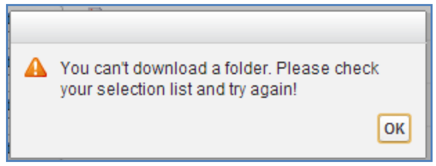


Figure 42

Notes

1. You cannot download folders. "Download" item menu action is invisible for the folders. You need to download files from folders.

2. Currently "Download Manager" ***can be used for one type of object at the same time***. So if you're downloading account files, you can't download case files at the same time using "Download Manager". You need to complete account file downloads, close the "Download Manager" and open a new "Download Manager" for case files.

3. You'll not be able to download files from "S-Drive Folders" and "S-Drive Attachments" using the same "Download Manager" screen. It will open different Download Managers.

4. In "Download Manager" if there is a file with the same name in the target download folder, file will be renamed to <FILENAME> (1). <EXTENSION> or <FILENAME>(2).<EXTENSION> etc. accordingly.

H. Opening Files

If you open the files automatically, you should click “Open” link (Figure 43).

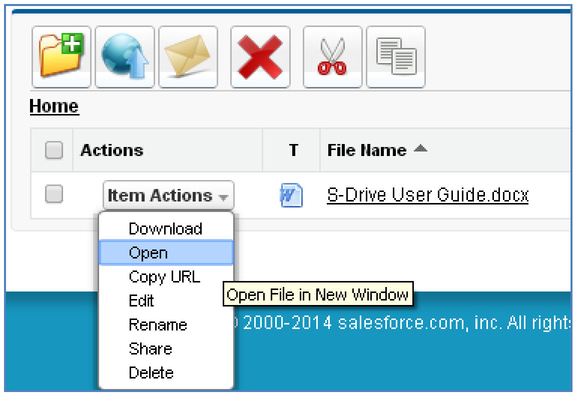


Figure 43

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

I. 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 44).

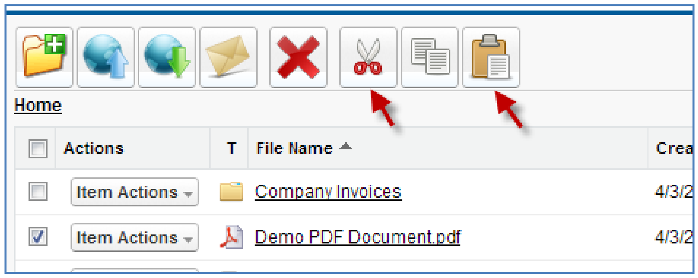


Figure 44

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 45).

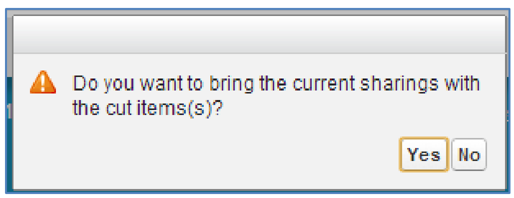


Figure 45

It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 46). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.

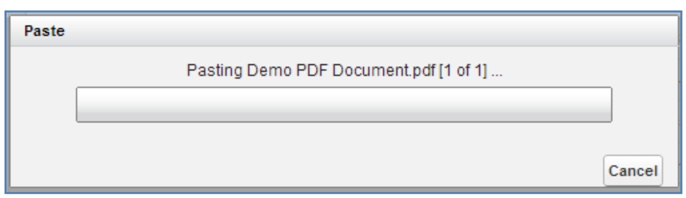


Figure 46

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 47).

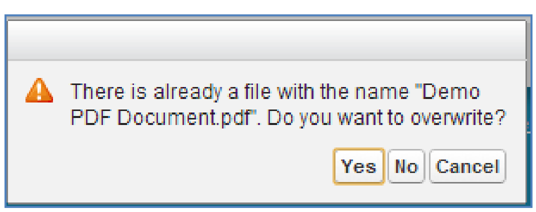


Figure 47

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

2. "**Cut**" and **"Paste"** buttons become invisible if you do not have permissions to cut/paste items in the current folder.

J. 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 48).

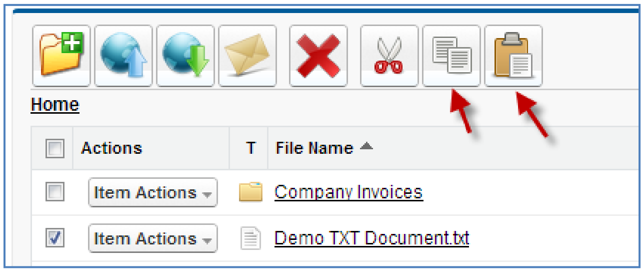


Figure 48

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 49).

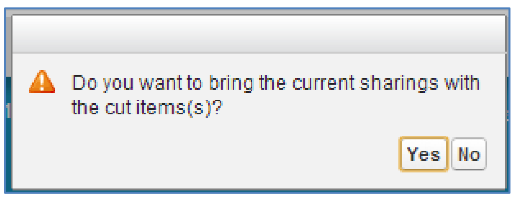


Figure 49

It will start the copy operation and a progress bar will be displayed in the middle of the screen (Figure 50). You can cancel the copy operation anytime by clicking the "Cancel" button. After completion of the copy operation this pop-up screen will disappear.

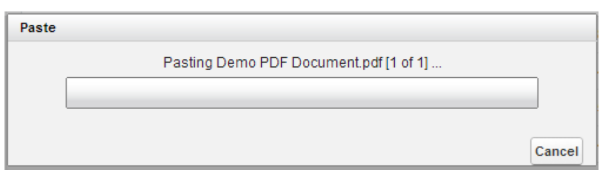


Figure 50

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 51).

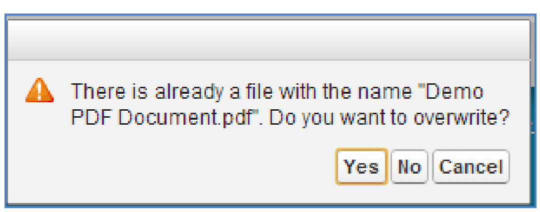


Figure 51

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.

K. 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 52-1), and type in the new name in the opening Rename screen(Figure 52-2).

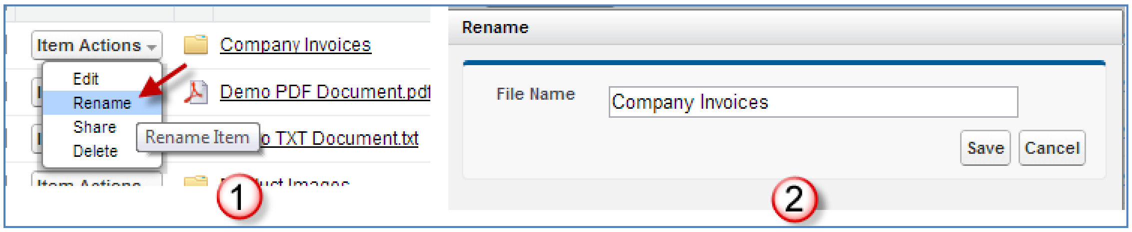


Figure 52

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 53).

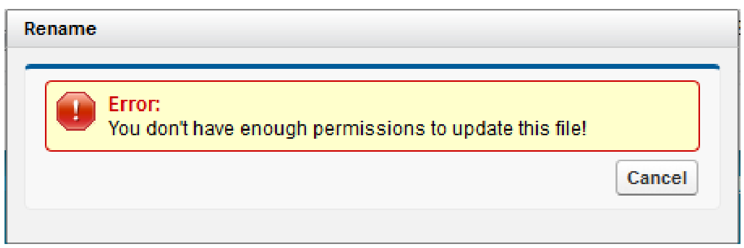


Figure 53

L. 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 54).

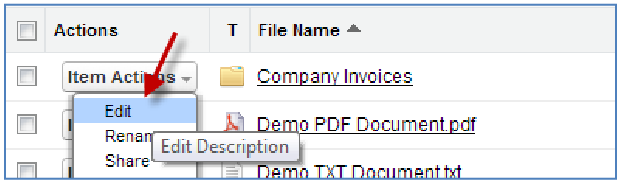


Figure 54

A new pop-up named "Edit" will be opened. You can change the description here and click "Save" button to save changes. If you click Cancel button, description won't be updated and this pop-up will be closed (Figure 55).

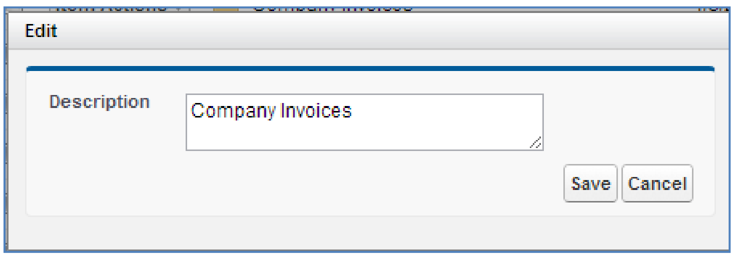


Figure 55

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 56).

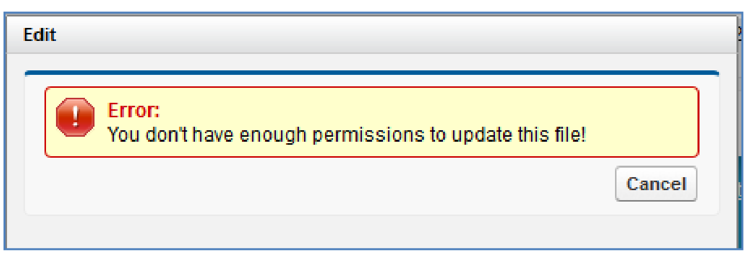


Figure 56

M. 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 57).

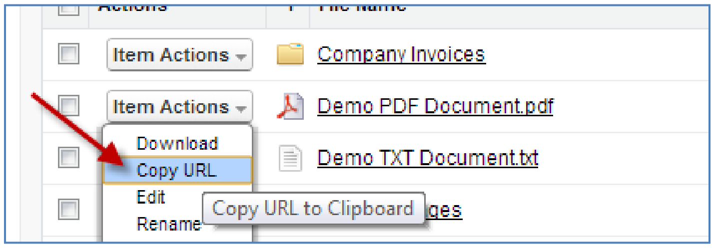


Figure 57

After clicking this button, Copy URL pop-up will be displayed (Figure 58). Select the URL by clicking "Select URL" link in this pop-up. You can close this pop-up by clicking "Close" link.

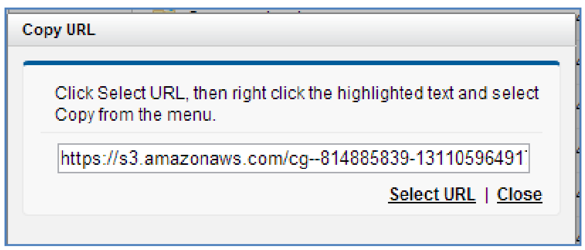


Figure 58

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 59).

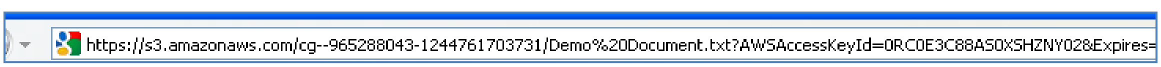


Figure 59

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.

N. Sharing Files & Folders

With S-Drive 1.25, object level sharing is supported for S-Drive Folders. You can share files and folders by clicking "Item Actions" button under "Actions" column ad selecting **"Share"** action menu item from dropdown for individual files and folders (Figure 60).

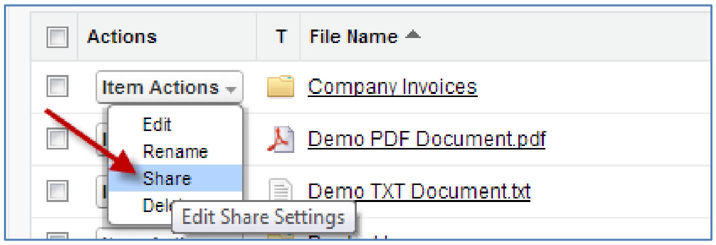


Figure 60

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 61). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.

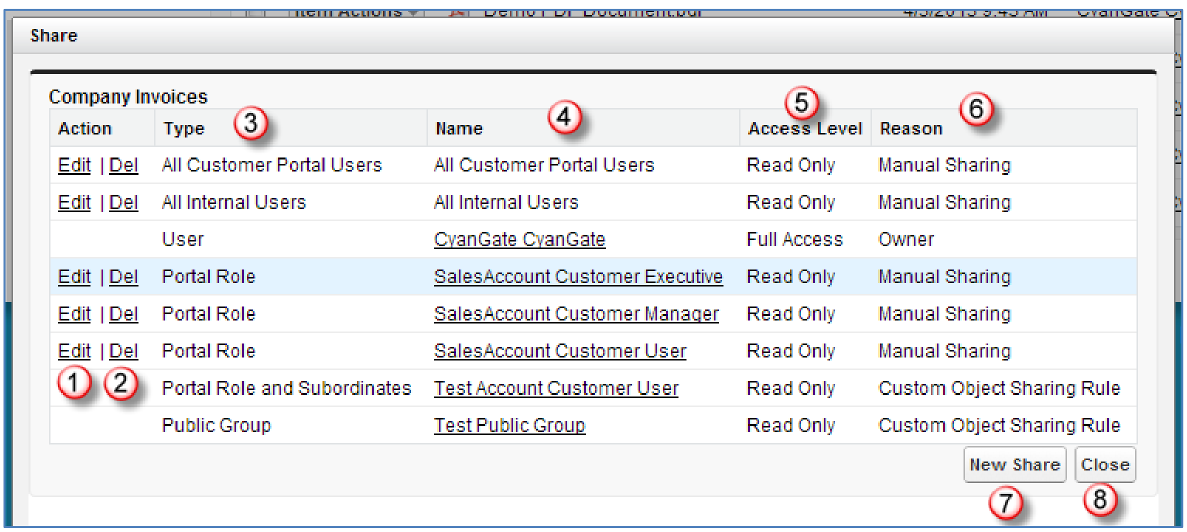


Figure 61

"Action" column is used to edit or delete the manual shares (Figure 61-1 and Figure 61-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 61-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 61-4). 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 61-5). "Reason" column displays the reason of the sharing (Figure 61-6). 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 61-7) and close this screen by clicking "Close" button (Figure 61-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 62). You can select the "Type" from the dropdown (Figure 62-1). Once you select the type, available fields will be listed in "Available" section (Figure 62-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 62-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 62-4). 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 62-5).

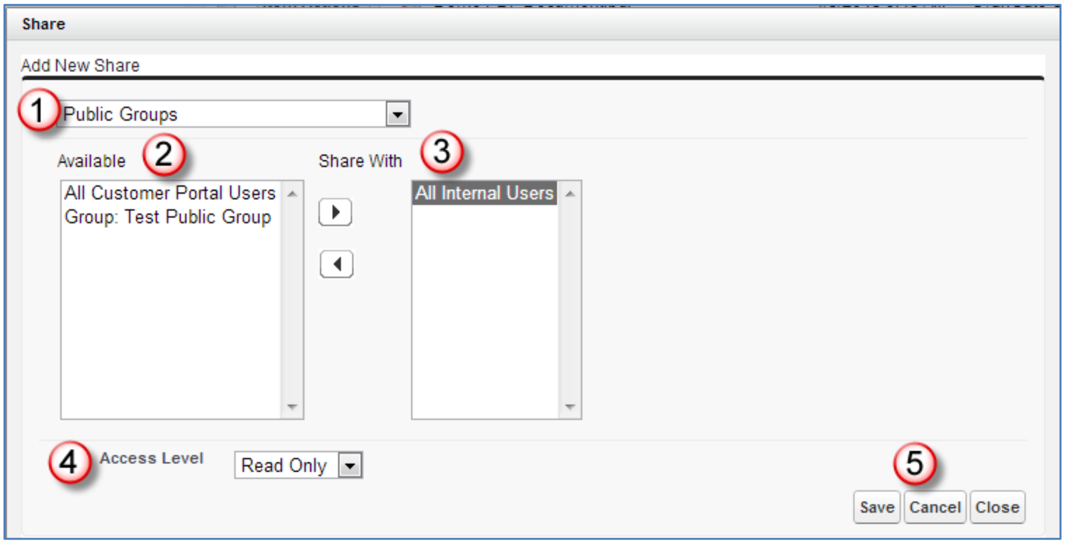


Figure 62

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 61-1). You can change selected object's access level and save (Figure 63).

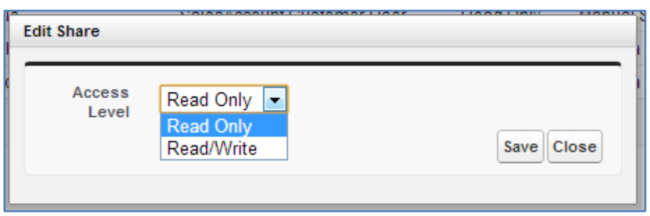


Figure 63

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 61-2). If you select "Yes", share will be deleted (Figure 64).

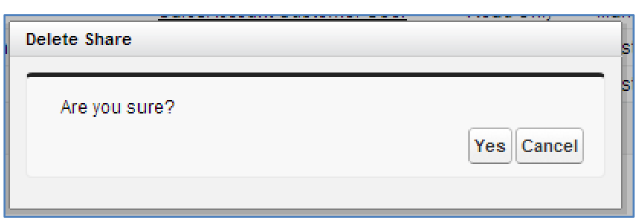


Figure 64

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 65) at the time of creation.

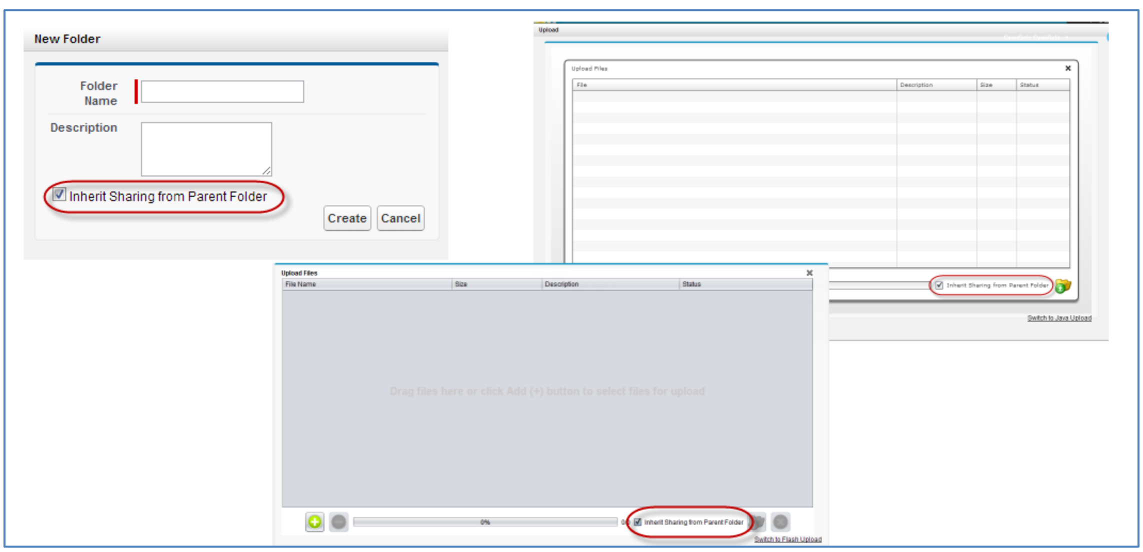


Figure 65

6. If there are profile level permission definitions, profile level permissions override the sharing settings. So if "S3Objects"is set as read only for a profile, there is no meaning to give read/write access on a folder.

7. Based on the shares that your file/folder have, some or all of the "Item Actions" item action menus may be invisible or clicking the item in the dropdown will warn you with a "not enough permission" error message.

8. If you want to restrict standard users to create files and folders at the top level of S-Drive Folders you can check **"Only Allow Users with Modify All Permissions to Create Items at the Top Level"** checkbox from "S-Drive Configuration" tab.

9. "Share" item action menu in "Item Actions" dropdown is not visible to customer portal users.

O. 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 66).

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.

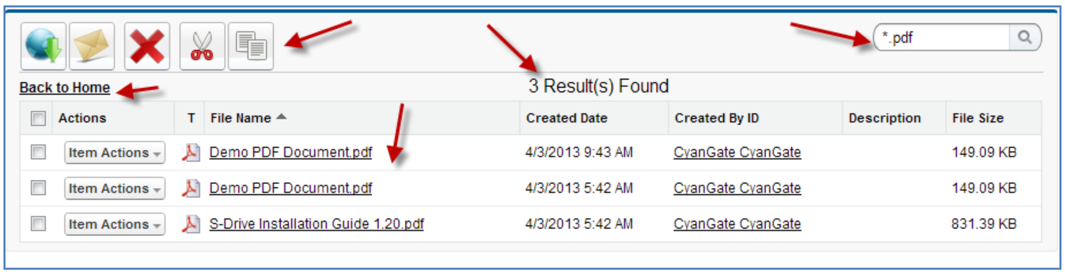


Figure 66

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 67-1).

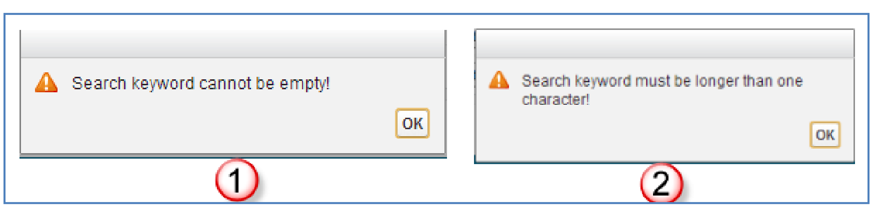


Figure 67

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 67-2).

P. iOS (iPad, iPhone, iPod) Support

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments with S-Drive 1.25(Figure 68).

Figure 68

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 69).

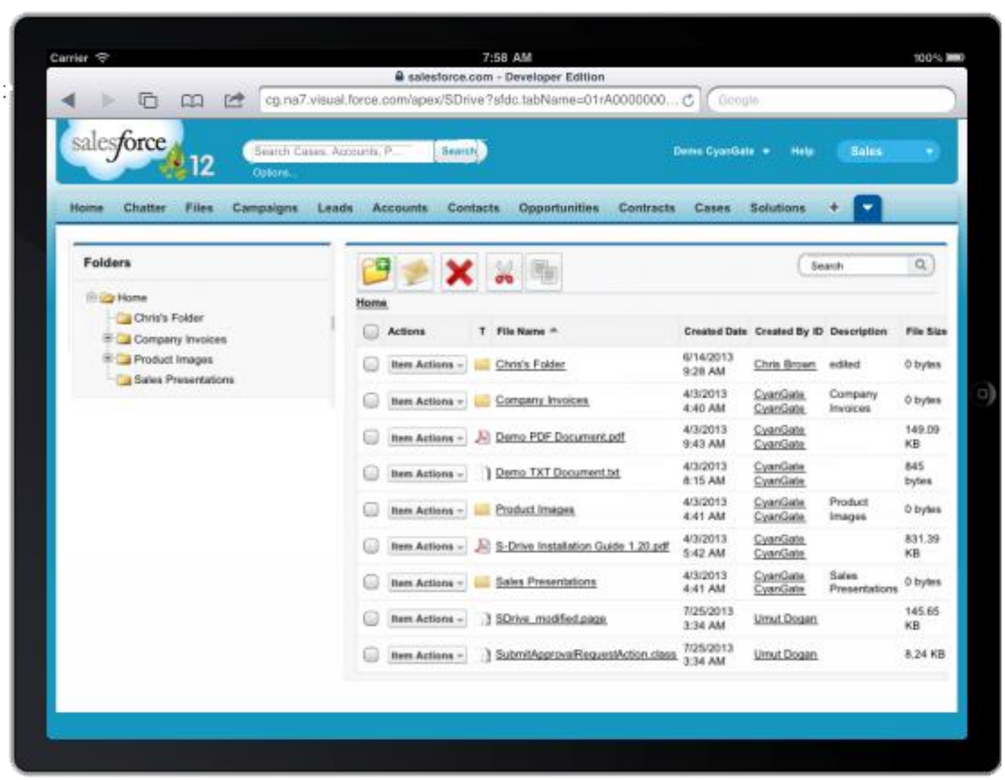


Figure 69

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

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

Below is a screenshot of the Case Files section from an iPad device (Figure 70).

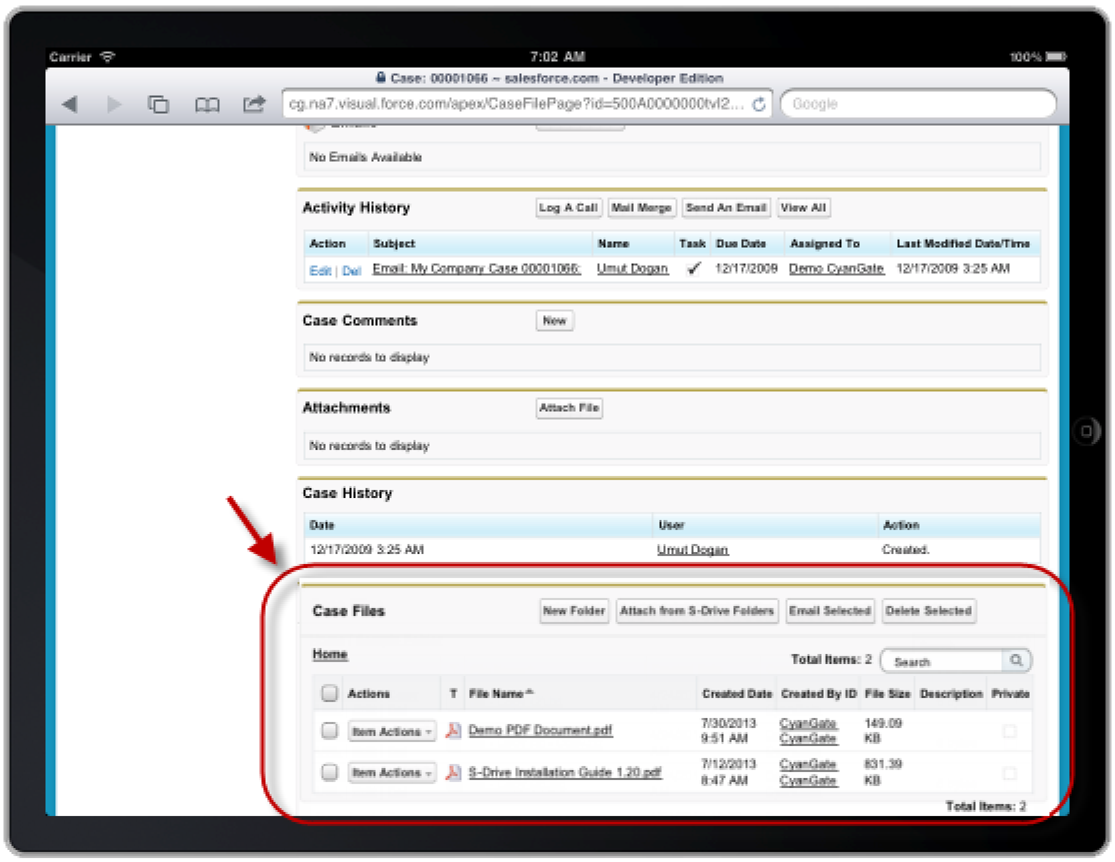


Figure 70

Q. S-Drive Attachments

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

1. Account Files

After installing S-Drive, if you made the configuration correctly you'll be able to create account files in "Accounts" tab for each account easily. Go to your "Accounts" tab, select an account from the list (or create a new account). If you can see the "Account Files" page block in the current account's page you can keep on reading (Figure 71). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.

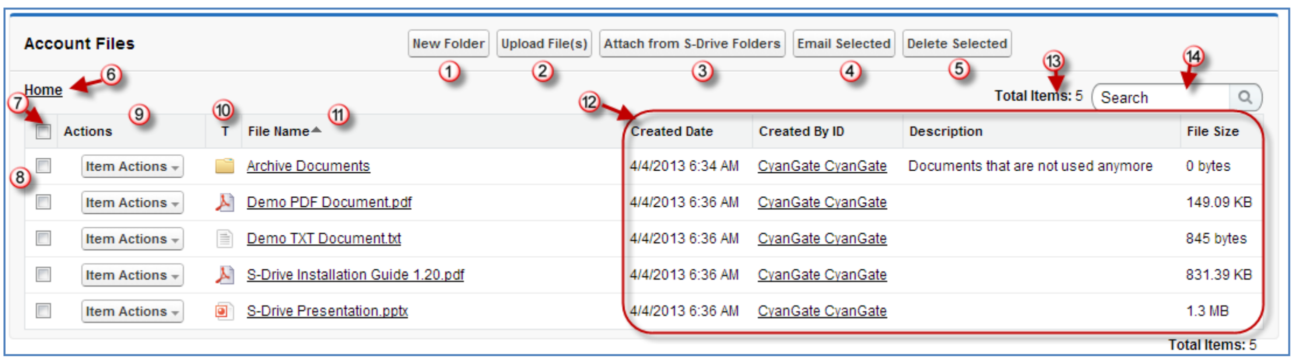


Figure 71

(1) "New Folder Button": This button is used to create new folders (Figure 71-1). 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 72).

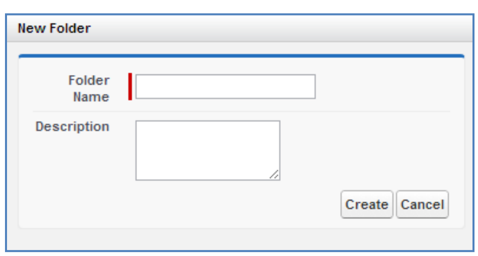


Figure 72

(2) "Upload File(s) Button": This button is used to add account files to this account (Figure 71-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 73).

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

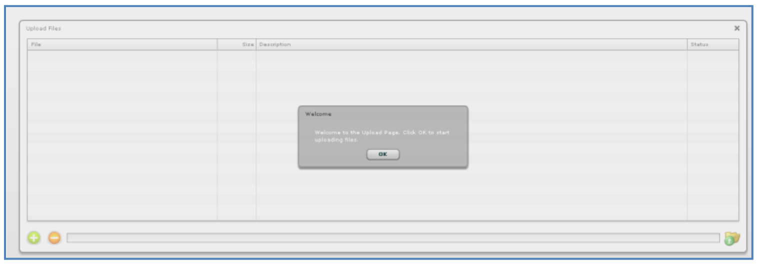


Figure 73

(3) "Attach from S-Drive Folders Button": This button is used to attach files from S-Drive Folders to this account (Figure 71-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this account (Figure 74-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 74-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 74-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.

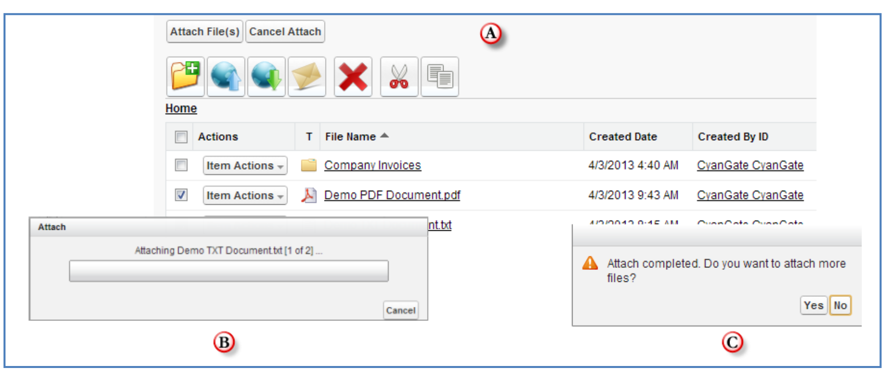


Figure 74

(4) "Email Selected Button": This button is used to email selected account files (Figure 71-4). 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 75). After making selections and clicking the "Email Selected" button, “Email Files” screen will be opened. This screen is similar to the "Email Screen" reviewed in “Emailing Files” section. You can refer to this section for more information about emailing files.

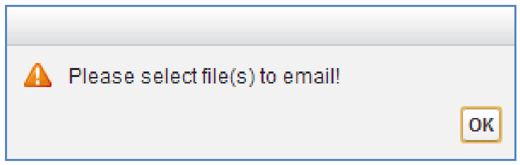


Figure 75

(5) "Delete Selected Button": This button is used to delete selected account files from current account (Figure 71-5). 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 76-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 76-B). If you click “Yes”, delete process will start.

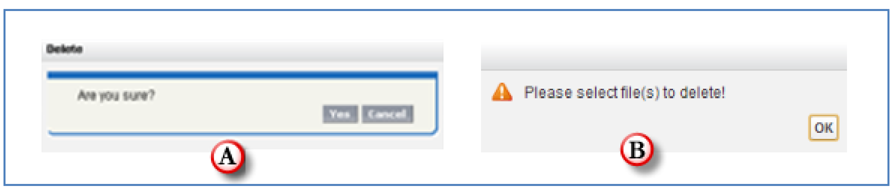


Figure 76

(6) "Current Folder Information Holder": Used to display where the current files/folder are in the hierarchy (Figure 71-6). You can click folders above to go to that folder.

(7) "Select All Option": Used to select all account files/folders for deletion/email etc. (Figure 71-7).

(8) "Select Single Item Option": Used to select single account file/folder for deletion/email etc. (Figure 71-8).

(9) "Actions Column": Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 71-9).

"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 77). 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 78). This item menu action is only for files and not available for folders.

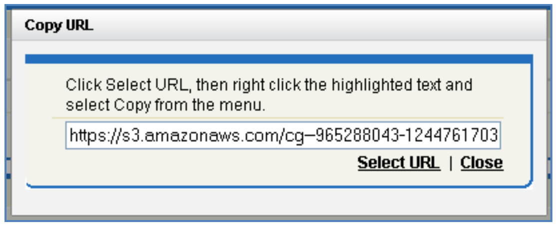


Figure 77

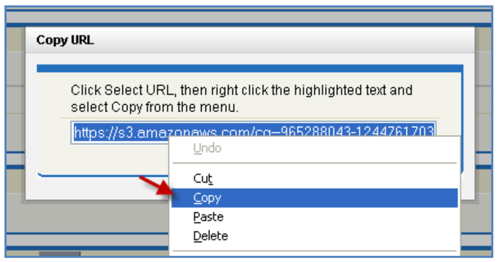


Figure 78

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 79) 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.

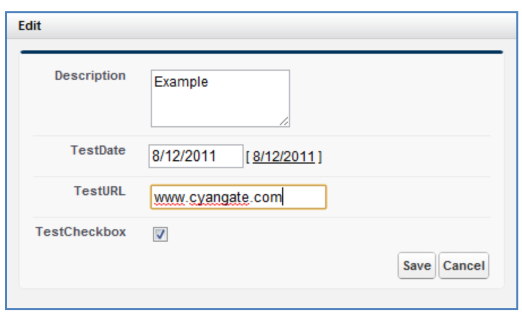


Figure 79

"Delete ": Used to delete selected account file/folder. After clicking this link, you'll get a warning message (Figure 76-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.

(10) "Content Type Column": Displays a type icon based on the content type of the account file/folder (Figure 71-10).

(11)"File Name Column": File name information for the account files (Figure 71-11). You can sort files/folder ascending or descending by clicking the field header.

(12)"Customizable Field Columns": These sections are used to display customizable fields (Figure 71-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13)"Total Items / Pagination": Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 71-13). 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 80). 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.

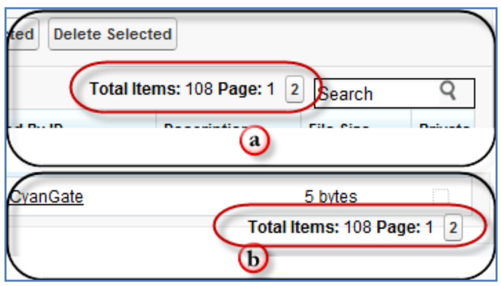


Figure 80

(14)"Search Box": You can search for files and folders inside S-Drive Attachments (Figure 71-14 and Figure 81). 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.

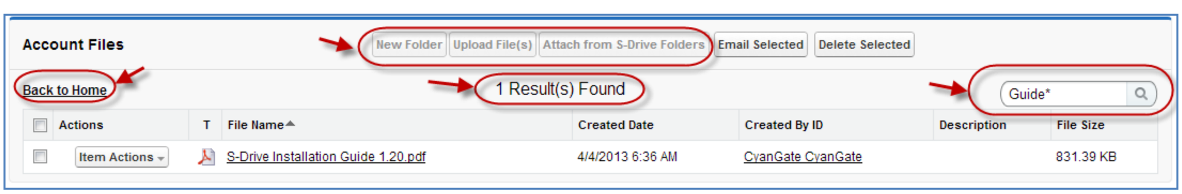


Figure 81

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

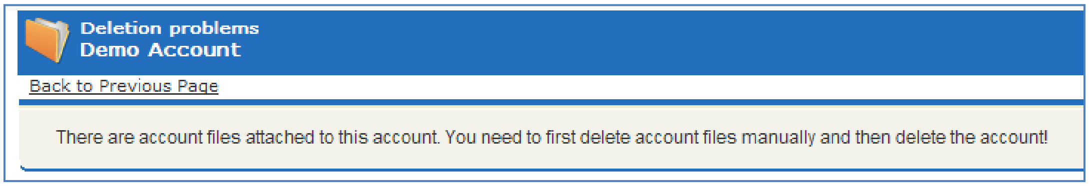


Figure 82

2. Contact Files

After installing S-Drive, if you made the configuration correctly you'll be able to create contact files in "Contacts" tab for each contact easily. Go to your "Contacts" tab, select a contact from the list (or create a new contact). If you can see the "Contact Files" page block in the current contact's page you can keep on reading (Figure 83). Otherwise please consult to the "S-Drive Installation Guide" to activate "Contact Files" section.

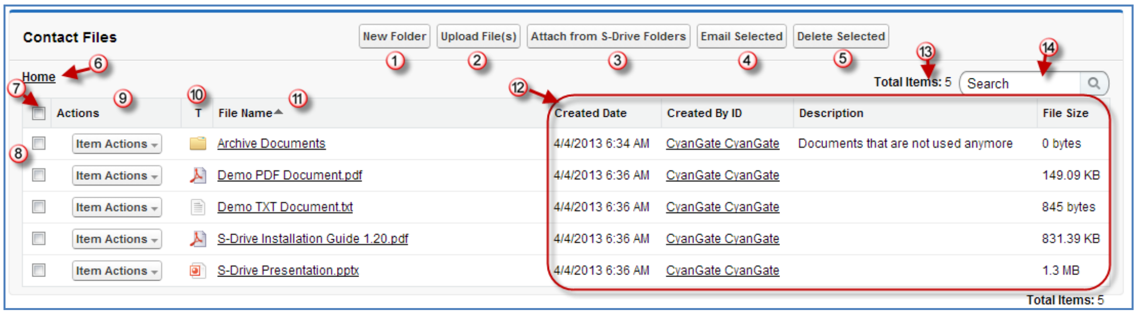


Figure 83

(1) "New Folder Button": This button is used to create new folders (Figure 83-1). 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 84).

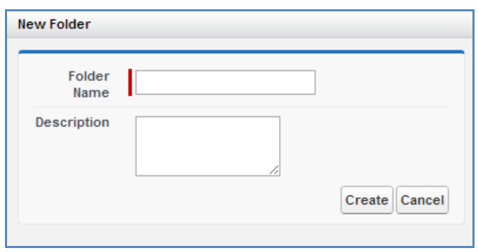


Figure 84

(2) "Upload File(s) Button": This button is used to add contact files to this contact (Figure 83-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 85).

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

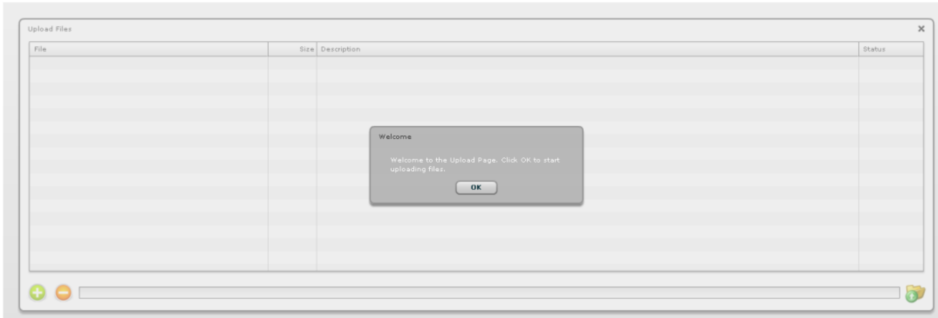


Figure 85

(3) "Attach from S-Drive Folders Button": This button is used to attach files from S-Drive Folders to this contact (Figure 83-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the toolbar section to attach files to this contact (Figure 86-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 86-B). After completion of the attach process, you’ll be asked: “Attach completed. Do you want to attach more files?” If you select “Yes”, message will be closed and you can select more files to attach. If you select “No”, page will be closed and you’ll be redirected to the contact page (Figure 86-C). “Cancel Attach” button also redirects you to the contact page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. “Attach from S-Drive Folders” button is not available for customer portal users.

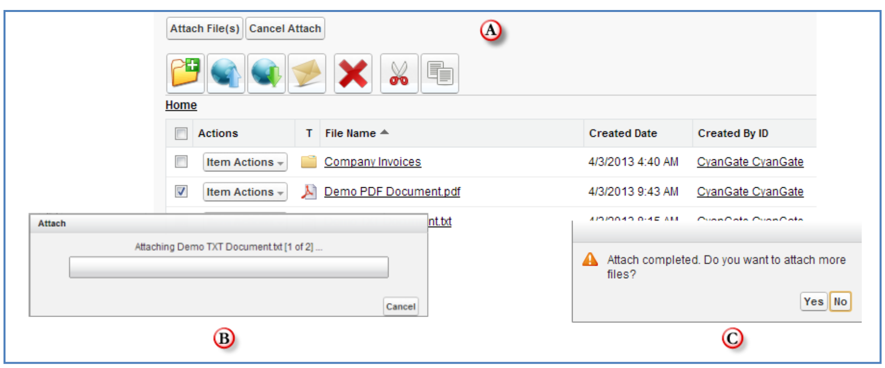


Figure 86

(4) "Email Selected Button": This button is used to email selected contact files (Figure 83-4). 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 87). After making selections and clicking the "Email Selected" button, “Email Files” screen will be opened. This screen is similar to the "Email Screen" reviewed in “Emailing Files” section. You can refer to this section for more information about emailing files.

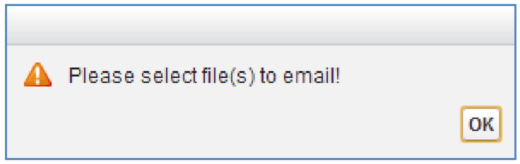


Figure 87

(5) **"Delete Selected Button"**: This button is used to delete selected contact files from current contact (Figure 83-5). 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 88-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 88-B). If you click “Yes”, delete process will start.

Figure 88

(6) **"Current Folder Information Holder":** Used to display where the current files/folder are in the hierarchy (Figure 83-6). You can click folders above to go to that folder.

(7) **"Select All Option"**: Used to select all contact files/folders for deletion/email etc. (Figure 83-7).

(8) **"Select Single Item Option"**: Used to select single contact file/folder for deletion/email etc. (Figure 83-8).

(9) **"Actions Column":** Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 83-9).

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

"Copy URL": Used to copy the URL of the selected contact file. After clicking this link a popup will appear along with the URL of the selected file (Figure 89). 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 90).

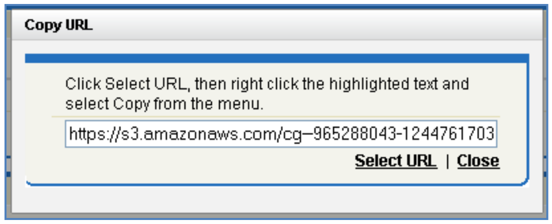


Figure 89

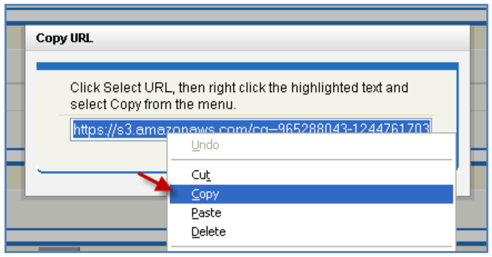


Figure 90

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 91) and you'll be able to edit current contact file's/folder's editable fields. Edit the fields, then click "Save". After clicking “Save”, edit process will start. You can click "Cancel" to cancel the edit operation.

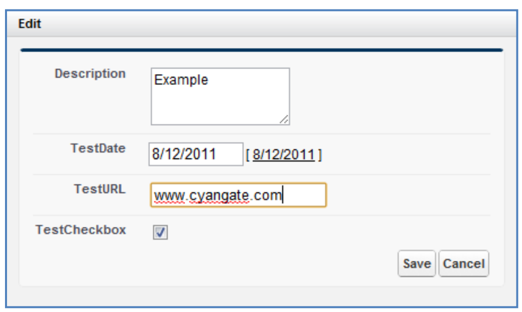


Figure 91

"Delete": Used to delete selected contact file/folder. After clicking this link, you'll get a warning message (Figure 88-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.

(10) "Content Type Column": Displays a type icon based on the content type of the contact file/folder (Figure 83-10).

(11) "File Name Column": File name information for the contact files (Figure 83-11). You can sort files/folder ascending or descending by clicking the field header.

(12) "Customizable Field Columns": These sections are used to display customizable fields (Figure 83-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13) "Total Items / Pagination": Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 83-13). 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 80). 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.

(14) "Search Box": You can search for files and folders inside S-Drive Attachments (Figure 83-14 and Figure 81). 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.

Notes

1. You cannot delete a contact which has contact files attached. You'll get an error message if you try to delete this kind of contact (Figure 92). You need to delete contact files first, and then you can delete the contact.

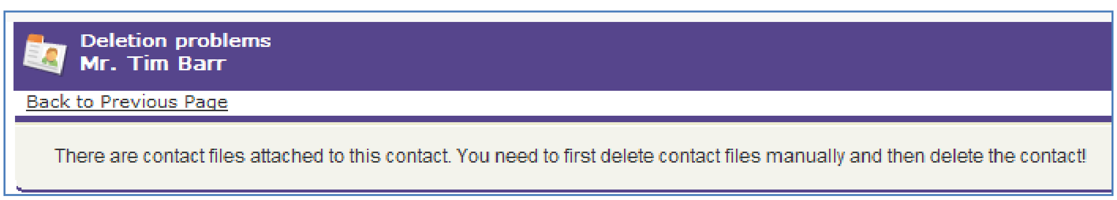


Figure 92

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

3. Opportunity Files

After installing S-Drive, if you made the configuration correctly you'll be able to create opportunity files in "Opportunities" tab for each opportunity easily. Go to your "Opportunities" tab, select an opportunity from the list (or create a new opportunity). If you can see the "Opportunity Files" page block in the current opportunity's page you can keep on reading (Figure 93). Otherwise please consult to the "S-Drive Installation Guide" to activate "Opportunity Files" section.

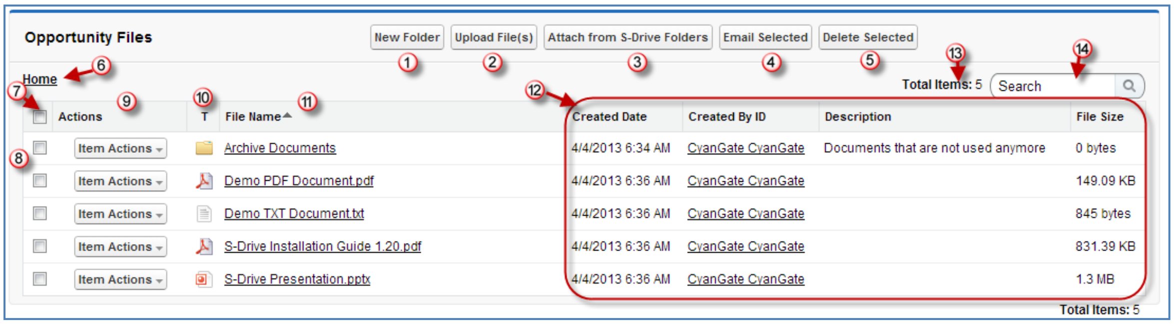


Figure 93

(1) "New Folder Button": This button is used to create new folders (Figure 93-1). 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 94).

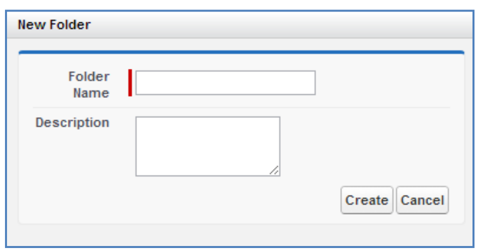


Figure 94

(2) "Upload File(s) Button": This button is used to add opportunity files to this opportunity (Figure 93-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 95).

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

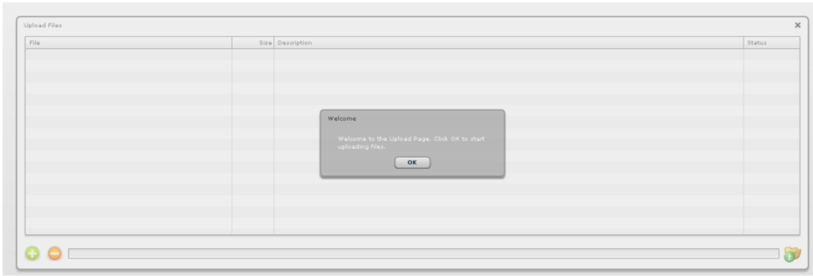


Figure 95

(3) "Attach from S-Drive Folders Button": This button is used to attach files from S-Drive Folders to this opportunity (Figure 93-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the “current folder information holder” text to attach files to this opportunity (Figure 96-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 96-B). After completion of the attach process, you’ll be asked: “Attach completed. Do you want to attach more files?” If you select “Yes”, message will be closed and you can select more files to attach. If you select “No”, page will be closed and you’ll be redirected to the opportunity page (Figure 96-C). “Cancel Attach” button also redirects you to the opportunity page. You can cancel the attach process while it is in progress by clicking "Cancel" button in the progress screen. “Attach from S-Drive Folders” button is not available for customer portal users.

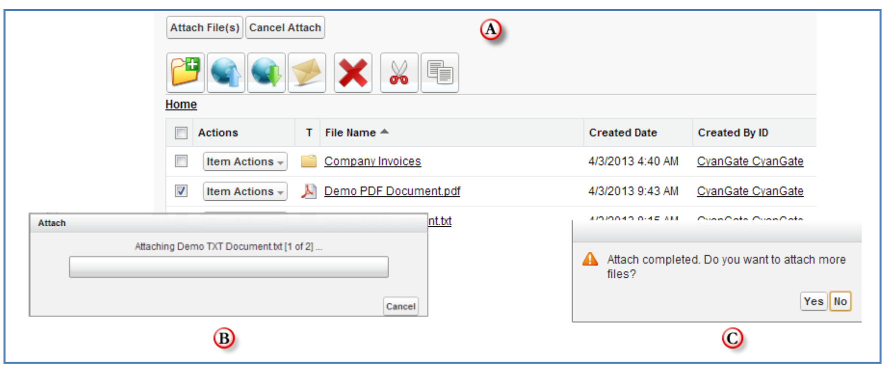


Figure 96

(4) "Email Selected Button": This button is used to email selected opportunity files (Figure 93-4). 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 97). After making selections and clicking the "Email Selected" button, “Email Files” screen will be opened. This screen is similar to the "Email Screen" reviewed in “Emailing Files” section. You can refer to this section for more information about emailing files.

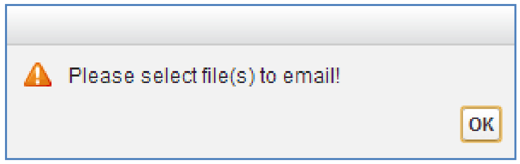


Figure 97

(5) "Delete Selected Button": This button is used to delete selected opportunity files from current opportunity (Figure 93-5). 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 98-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 98-B). If you click "Yes", delete process will start.

Figure 98

(6) "Current Folder Information Holder": Used to display where the current files/folder are in the hierarchy (Figure 93-6). You can click folders above to go to that folder.

(7) "Select All Option": Used to select all opportunity files/folders for deletion/email etc. (Figure 93-7).

(8) "Select Single Item Option": Used to select single opportunity file/folder for deletion/email etc. (Figure 93-8).

(9) "Actions Column": Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 93-9).

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

"Copy URL": Used to copy the URL of the selected opportunity file. After clicking this link a popup will appear along with the URL of the selected file (Figure 99). 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 100).

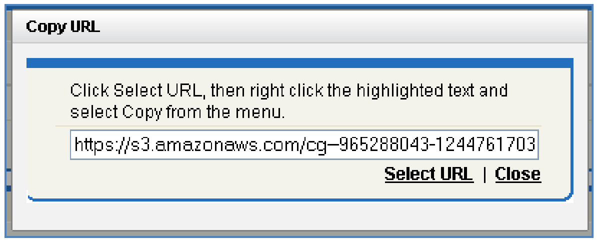


Figure 99

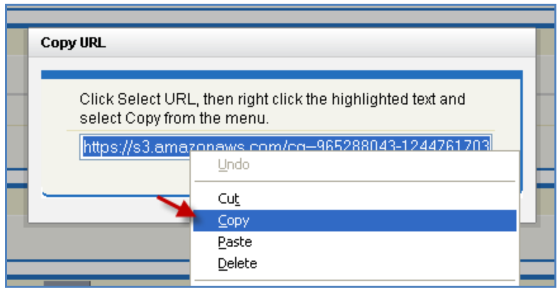


Figure 100

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 101) and you'll be able to edit current opportunity file's/folder's editable fields. Edit the fields, then click "Save". After clicking “Save”, edit process will start. You can click "Cancel" to cancel the edit operation.

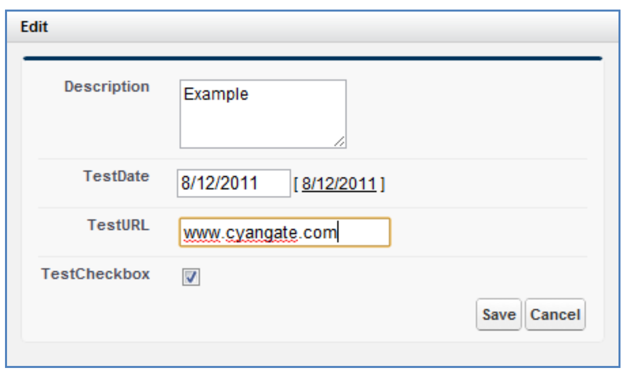


Figure 101

"Delete": Used to delete selected opportunity file/folder. After clicking this link, you'll get a warning message (Figure 98-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.

(10) "Content Type Column": Displays a type icon based on the content type of the opportunity file/folder (Figure 93-10).

(11)"File Name Column": File name information for the opportunity files (Figure 93-11). You can sort files/folder ascending or descending by clicking the field header.

(12)"Customizable Field Columns": These sections are used to display customizable fields (Figure 93-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13) "Total Items / Pagination": Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 93-13). 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 80). 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.

(14)"Search Box": You can search for files and folders inside S-Drive Attachments (Figure 93-14 and Figure 81). 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.

Notes

1.You cannot delete an opportunity which has opportunity files attached. You'll get an error message if you try to delete this kind of opportunity (Figure 102). You need to delete opportunity files first, and then you can delete the opportunity.

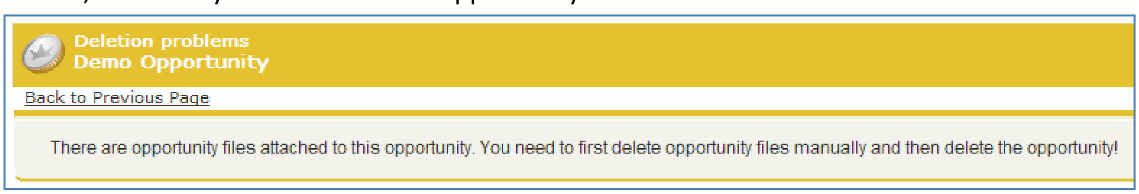


Figure 102

4. Case Files

After installing S-Drive, if you made the configuration correctly you'll be able to create case files in "Cases" tab for each case easily. Go to your "Cases" tab, select a case from the list (or create a new case). If you can see the "Case Files" page block in the current case's page you can keep on reading (Figure 103). Otherwise please consult to the "S-Drive Installation Guide" to activate "Case Files" section.

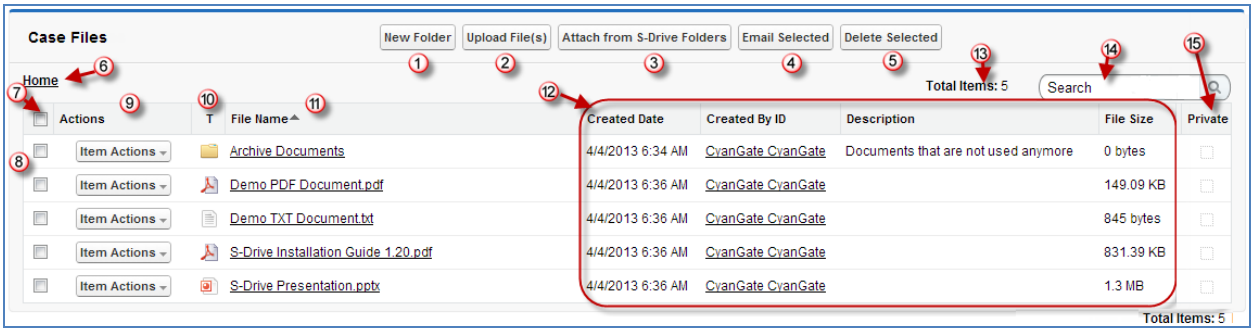


Figure 103

(1) "New Folder Button": This button is used to create new folders (Figure 103-1). 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 104).

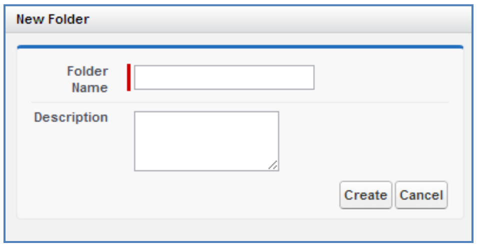


Figure 104

(2) "Upload File(s) Button": This button is used to add case files to this case (Figure 103-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 105).

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

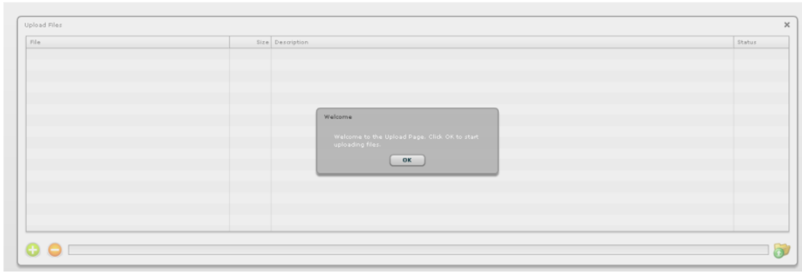


Figure 105

(3) "Attach from S-Drive Folders Button": This button is used to attach files from S-Drive Folders to this case (Figure 103-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the “current folder information holder” text to attach files to this case (Figure 106-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 106-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 106-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.

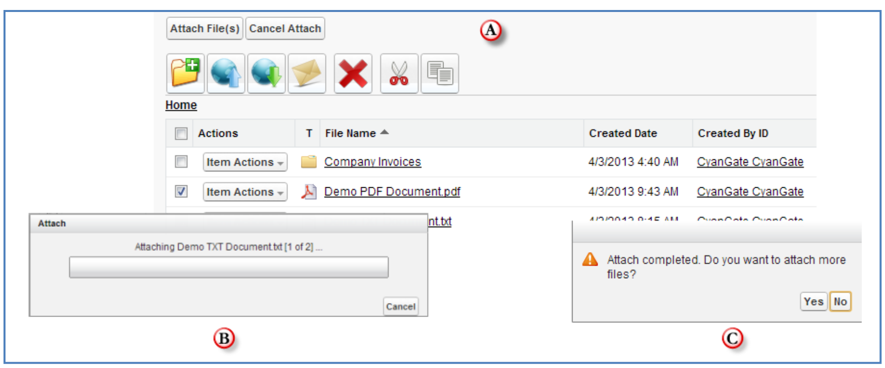


Figure 106

(4) "Email Selected Button": This button is used to email selected case files (Figure 103-4). 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 107). After making selections and clicking the "Email Selected" button, “Email Files” screen will be opened. This screen is similar to the "Email Screen" reviewed in “Emailing Files” section. You can refer to this section for more information about emailing files.

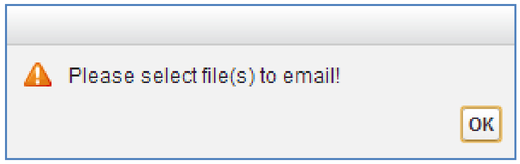


Figure 107

(5) "Delete Selected Button": This button is used to delete selected case files from current case (Figure 103-5). 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 108-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 108-B). If you click "Yes", delete process will start.

Figure 108

(6) "Current Folder Information Holder": Used to display where the current files/folder are in the hierarchy (Figure 103-6). You can click folders above to go to that folder.

(7) "Select All Option": Used to select all case files/folders for deletion/email etc. (Figure 103-7).

(8) "Select Single Item Option": Used to select single case file/folder for deletion/email etc. (Figure 103-8).

(9) "Actions Column": Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 103-9).

"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 109). 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 110).

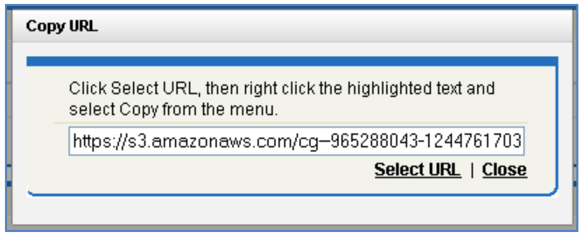


Figure 109

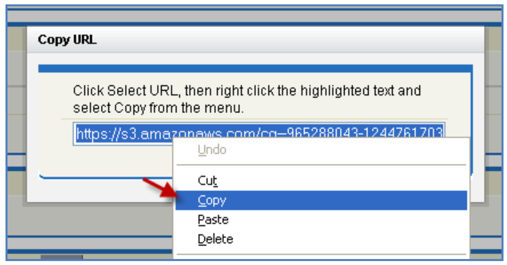


Figure 110

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 111) 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.

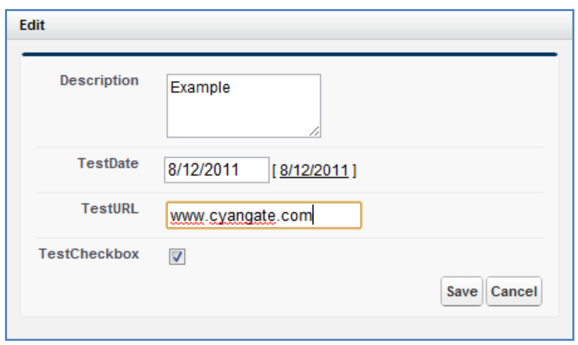


Figure 111

"Delete": Used to delete selected case file/folder. After clicking this link, you'll get a warning message (Figure 108-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.

(10)"Content Type Column": Displays a type icon based on the content type of the case file/folder (Figure 103-10).

(11)"File Name Column": File name information for the case files (Figure 103-11). You can sort files/folder ascending or descending by clicking the field header.

(12) "Customizable Field Columns": These sections are used to display customizable fields (Figure 103-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13)"Total Items / Pagination": Displays total items in selected folder and pagination if number of items are greater than the configured pagination number (Figure 103-13).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 80). 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.

(14)"Search Box": You can search for files and folders inside S-Drive Attachments (Figure 103-14 and Figure 81). 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.

(15) "Private": This checkbox is used to determine if the individual S-Drive attachment will be visible to the customer portal users (Figure 103-15). If the attachment is set to private, customer portal users won't be able to see the private file. File can be set to private/public in Upload Screen before uploading or anytime from Edit Screen. See "*S-Drive Advanced Configuration Guide – Creating Custom Object Files*" section for more information about the public/private flag.

(16)

Notes

1.You cannot delete a case which has case files attached. You'll get an error message if you try to delete this kind of case (Figure 112). You need to delete case files first, and then you can delete the case.

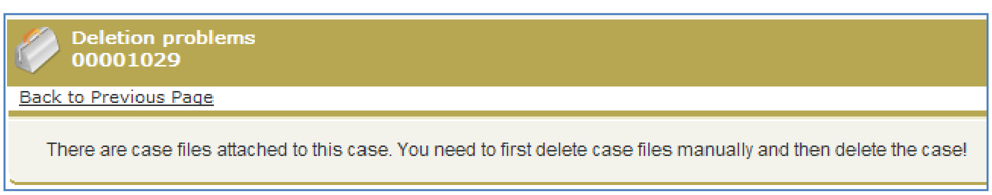


Figure 112

2. You can use "Case Files" feature from "Customer Portal" also. After making required configuration for customer portal (See *S-Drive Advanced Configuration Guide* for more information), your customers can add case files to cases using "Customer Portal Interface" (Figure 113).

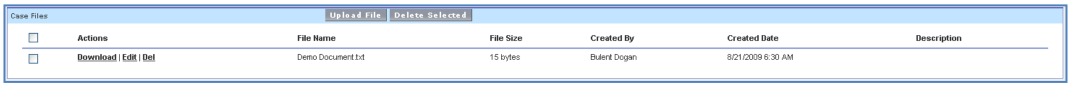


Figure 113

5. Other Standard/Custom Object Files

You can use “files” for standard/custom objects other than Accounts, Contacts, Opportunities, and Cases easily. Go to your object’s tab, select an object from the list (or create a new object). If you can see the "<Your Object Name> Files" page block in the current object's page you can keep on reading (Figure 114). Otherwise please consult to the "*S-Drive Advanced Configuration Guide*" to activate "<Your Object Name> Files" section.

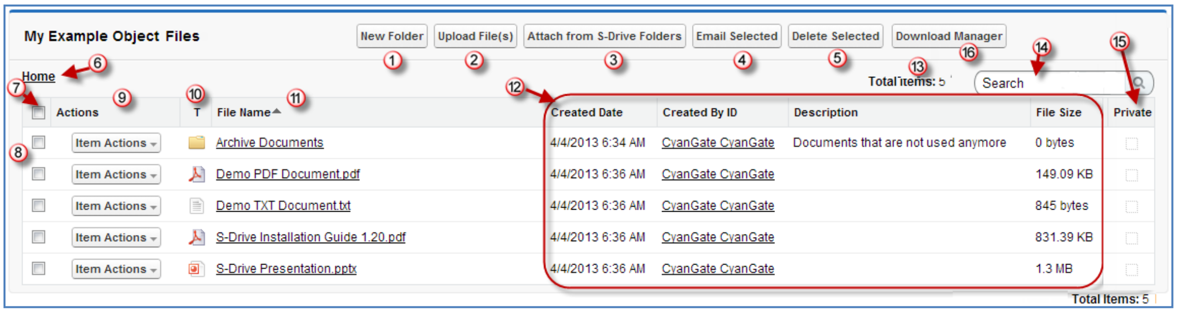


Figure 114

(1) "New Folder Button": This button is used to create new folders (Figure 114-1). 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. Also note that all fields related to custom object will be displayed in the new folder creation screen (Figure 115).

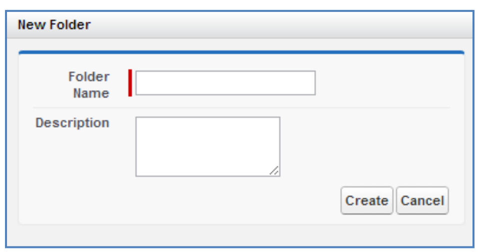


Figure 115

(2) "Upload File(s) Button": This button is used to add object files to this object (Figure 114-2). After clicking this button "Upload Files" screen will be initialized. After initialization finishes, for the first time it will welcome you with a message: *"Welcome to the Upload Page. Click OK to start uploading files."* (Figure 116).

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

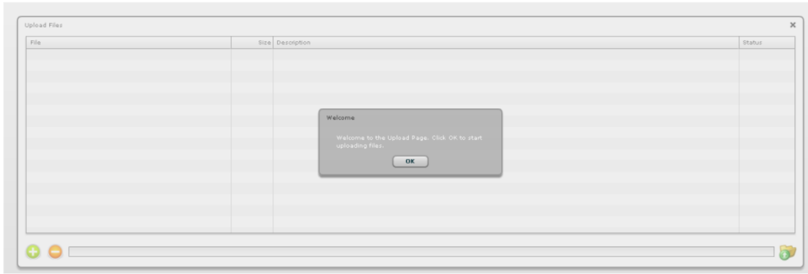


Figure 116

(3) "Attach from S-Drive Folders Button": This button is used to attach files from S-Drive Folders to this object (Figure 114-3). After clicking this button "S-Drive Folders" screen will be initialized. There will be two extra buttons above the “current folder information holder” text to attach files to this object (Figure 117-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 117-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 object page (Figure 117-C). “Cancel Attach” button also redirects you to the object page. You can cancel the attach process while it is in progress by clicking orange close button on the bottom-right corner of the progress screen. “Attach from S-Drive Folders” button is not available for customer portal users.

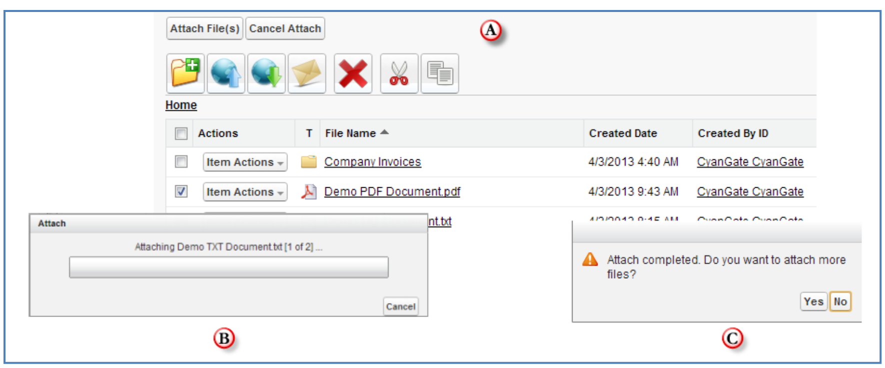


Figure 117

(4) "Email Selected Button": This button is used to email selected object files (Figure 114-4). 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 118). After making selections and clicking the "Email Selected" button, “Email Files” screen will be opened. This screen is similar to the "Email Screen" reviewed in “Emailing Files” section. You can refer to this section for more information about emailing files.

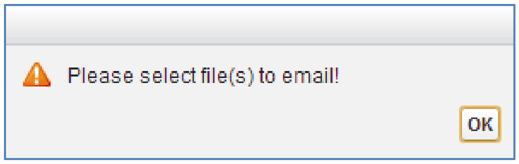


Figure 118

(5) "Delete Selected Button": This button is used to delete selected object files from current object (Figure 114-5). 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 119-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 119-B). If you click "Yes", delete process will start.

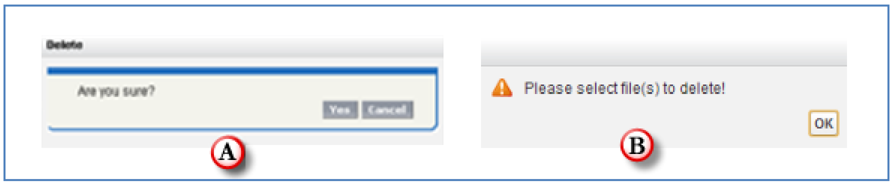


Figure 119

(6) "Current Folder Information Holder": Used to display where the current files/folder are in the hierarchy (Figure 114-6). You can click folders above to go to that folder.

(7) "Select All Option": Used to select all object files/folders for deletion/email etc. (Figure 114-7).

(8) "Select Single Item Option": Used to select single object file/folder for deletion/email etc. (Figure 114-8).

(9) "Actions Column": Contains "Item Actions" button. Once you click "Item Actions" button, dropdown is opened with list of item menu actions (Figure 114-9).

"Download": Used to download selected object 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 object. After clicking this link a popup will appear along with the URL of the selected file (Figure 120). 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 121).

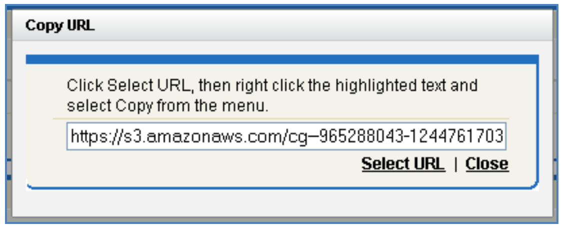


Figure 120

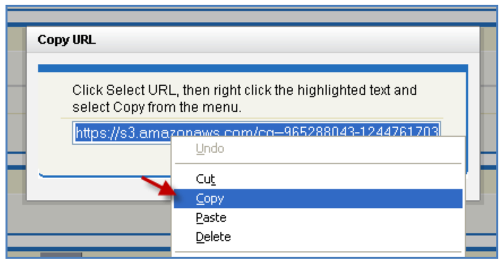


Figure 121

"Edit": Used to edit fields of a selected file/folder. After clicking this link; a new pop-up will be opened (Figure 122) and you'll be able to edit current object 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.

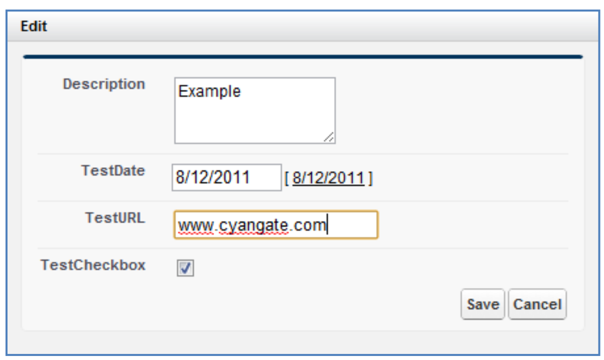


Figure 122

"Delete": Used to delete selected object file/folder. After clicking this link, you'll get a warning message (Figure 119-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.

(10)"Content Type Column": Displays a type icon based on the content type of the custom object file/folder files (Figure 114-10).

(11)"File Name Column": File name information for the object files (Figure 114-11). You can sort files/folder ascending or descending by clicking the field.

(12) "Customizable Field Columns": These sections are used to display customizable fields (Figure 114-12). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see "File Size", "Created Date", "Created By ID", "Description" and "File Size" columns by default. You can sort files/folder ascending or descending by clicking the field header if sorting is allowed for that field type.

(13)"Total Items / Pagination": Displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 114-13). 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 80). 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.

(14)"Search Box": You can search for files and folders inside S-Drive Attachments (Figure 114-14 and Figure 81). 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.

(15) "Private": This checkbox is used to determine if the individual S-Drive attachment will be visible to the customer portal users (Figure 114-15). If the attachment is set to private, customer portal users won't be able to see the private file. File can be set to private/public in Upload Screen before uploading or anytime from Edit Screen. See *"S-Drive Advanced Configuration Guide– Creating Custom Object Files"* section for more information about the public/private flag.

(16) "Download Manager": This button is used to download files using Download Manager (Figure 114-16). 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 123). You need to delete object files first, and then you can delete the object.

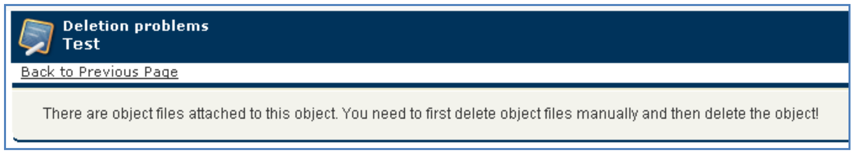


Figure 123

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

6. SDriveTools API

You can use SDriveTools API calls for programmatically interacting with S-Drive Attachments.

a. getAttachmentURL()

This method is used to get the URL of an S-Drive Attachment.

```
String getAttachmentURL(String parentId, String fileObjectId,
     Long timeValue)
```

Parameters:

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

fileObjectId: Id of the attachment (file) object. This can be retrieved using an SOQL query. An example can be found in following sections.

timeValue: Expiration time of the link in seconds.

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

Our example is about retrieving an image file from S-Drive Account Attachments and displaying it inside Account Page Layout. You can customize SOQL call and other options similar to the example.

1. First override Accounts View button with Account Files Page to upload a JPG image file to S-Drive Account Attachments. (Figure 124)

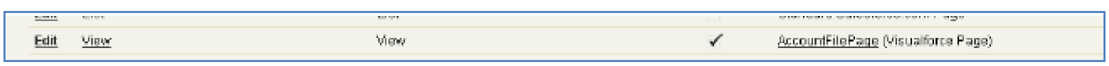


Figure 124

2. Upload a jpg image file into one of your accounts using Upload File(s) button. (Figure 125)

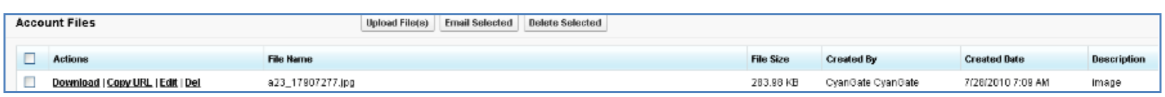


Figure 125

3. Create an apex class named ExamplePageController. In below code 1*60 is equivalent to one minute. You can set expiring time like this. Also you can configure your SOQL query based on your needs. (Figure 126)

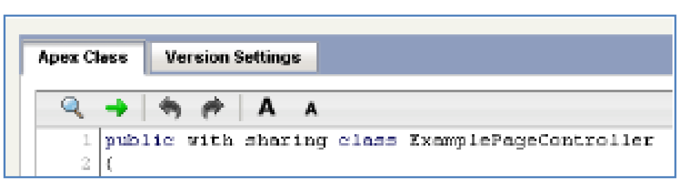


Figure 126

```
public with sharing class ExamplePageController
{
   private Account acct;
   private String fileURL = '';

   public ExamplePageController(ApexPages.StandardController controller)
   {
      this.acct = (Account)controller.getRecord();

      List<cg__AccountFile__c> accountFiles = [Select id from cg__AccountFile__c where
cg__AccountFile__c.cg__WIP__c = false and cg__AccountFile__c.cg__Content_Type__c =
'image/jpg' and cg__AccountFile__c.cg__Account__c = :acct.id];

      if(accountFiles.size() > 0)
      {
         fileURL = cg.SDriveTools.getAttachmentURL(acct.id, accountFiles[0].id, (1 * 60));
      }
      else
      {
         fileURL = 'http://www.cyangate.com/noimage.jpg';
      }
   }
   public String getFileURL()
   {
      return fileURL;
   }
}
```

4. Create an ExamplePage apex page with below content. (Figure 127)

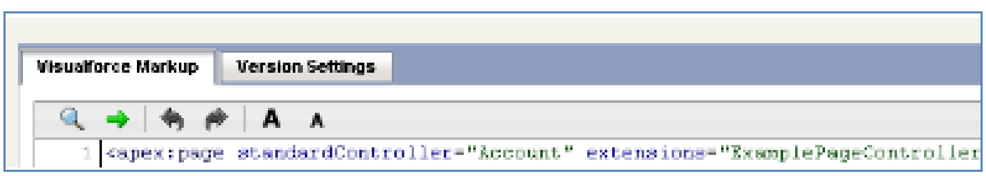


Figure 127

```
<apex:page standardController="Account" extensions="ExamplePageController">
        <apex:image url="{!fileURL}" />
</apex:page>
```

5. Customize your account page layout and include ExamplePage inside the layout. (Figure 128)

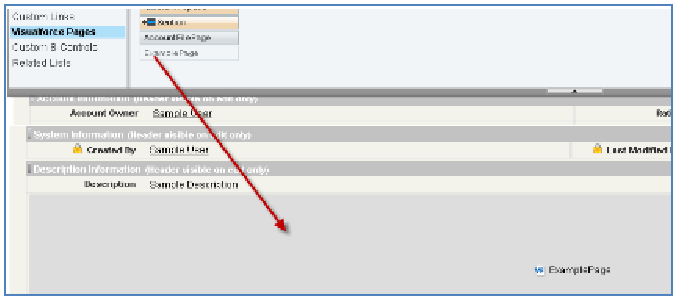


Figure 128

6. Now if you reload your account (which contains an image file) you'll see a screen like below. You can customize the apex class and page based on your needs. (Figure 129)

Figure 129

a. getAttachmentURLs()

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

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

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

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

Parameters:

parentIds: List of Salesforce ids of the parent objects. You can use 15-character id or 18-character id.

fileObjectIds: List of Salesforce ids of the attachment (files) objects.

timeValue: Expiration time of the links in seconds.

requestParameters: Map of request parameters and theirs values to set the parameters in the response (e.g. (*'response-content-disposition'*, *'inline; filename=myfile.png'*)). For more information visit the Amazon documentation:

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

requestParametersList: List of request parameters map for each files.

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

b. id15to18()

This method is used to convert Salesforce Ids from 15 characters to 18 characters.

```
String id15to18(String inID)
```

Parameters:

inID: 15-character Salesforce id.

Return Value: The method will return the 18-character Salesforce id.

c. getAccessKey()

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

```
String getAccessKey()
```

d. getBucketName()

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

```
String getBucketName()
```

e. getS3Endpoint()

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

```
String getS3Endpoint()
```

f. deleteFiles()

This method is used to delete files stored as attachments or under S-Drive folders.

```
List<ResultObject> deleteFiles(List<ID> wipIds, String objectId)
```

Parameters:

wipIds: List of Salesforce.com IDs of “file” records (either attachments or S-Drive Folder files).

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com ID.

Return Value: The method will return a list of ResultObject (Figure 131) which holds delete status information for each file record.

Example code:

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

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

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

g. initializeUpload()

This method is used to initialize attachment uploads.

```
List<UploadRequestInfo> initializeUpload
(String objectId, List<SObject> attachments, Map<String,String> policyMap)
```

Parameters:

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com id. For example, this ID is the ID of the case record if the attachments are being uploaded for a case.

attachments: List of Salesforce SObject for uploading. The SObject will be representing the “File” object. For example, for a Case attachment, the SObject will be representing the cg__CaseFile__c record.

policyMap: Map of policy conditions and theirs values that represent the additional policy parameters used during upload (e.g. (*'$Content-Disposition'*, ‘*attachment; filename*)). For more information visit the Amazon documentation:

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

Return Value: The method will return the list of UploadRequestInfo (Figure 130), which holds information about the files that are about to be uploaded.

The following steps are executed within this method:

1. Validate the input with the following rules:
   a. If the uploaded attachments are of type S3Object (i.e. files in S-Drive tab), the Parent__c field should be the same for all files.
   b. If the uploaded attachments are of type S3Object (i.e. files in S-Drive tab), there should not be an existing file with the same name in the same folder.
   c. File name and file size can’t be blank
   d. File name can’t include the following characters: \ / : * ? \" <> | ~
   e. File size can’t be zero.
   f. File size can’t be more than the Max file size defined in S-Drive Configuration.
2. Create the file record in Salesforce with work in progress state (WIP__c = true) (i.e. create S3Object, Case File, Custom Object File, etc).

3. Calculate policy, signature, file name etc. in order to be used as the POST parameters. While calculating the policy, policyMap parameter is used to generate different parameters in the policy. For html upload please reference Figure 132 and for flash uploads please reference Figure 133.
4. Returns a list of UploadRequestInfo (Figure 130) objects.

Example code:

```
List<SObject>attachments = new List<SObject>();

My_Example_Object_File__c attachment = new My_Example_Object_File__c ();

attachment.File_Name__c = 'Example.txt';

attachment.File_Size_in_Bytes__c ='100';

attachment.Parent__c = 'a0I80...';

String objectId = String.valueOf(attachment.Parent__c);

attachments.add(attachment);

Map<String, String> policyMap= new Map<String,String>();

policyMap.put('$Content-Disposition','attachment; filename');

List<cg.UploadRequestInfo> uploadRequestInfos=

cg.SDriveTools.initializeUpload(objectId ,attachments, policyMap );
```

Notes

1- It is required to set SObject's File_Name__c, File_Size_in_Bytes__c and Parent__c fields. You can optionally set other custom fields.

2-For S-Drive Attachments files, Parent__c refers to its parent object id. In order to set the parent folder id, use Parent_Folder_Id__c field. For S-Drive Folders files, Parent__c refers to its parent folder id and if you want to upload the file to home folder set this to **null**. Also for S-Drive Folders files, objectId must to be set to **null**.

3- If you put expiration, *acl*, *bucket*, *key* and *x-amz-server-side-encryption* conditions in the **policyMap**, these parameters will be ignored. Because, these are being set in the initializeUpload () method. You do not need to put these parameters in the **policyMap**. But, you must use these parameters while uploading. For this, please reference Figure 134.

g. completeUpload()

This method is used to complete attachments upload once the files have been uploaded to Amazon S3.

```
List<ResultObject> completeUpload(List<ID> wipIds)
```

Parameters:

wipIds: List of Salesforce ids for attachment “file” records. These IDs have been returned from the initializeUpload() method for each file record.

Return Value: The method will return the list of ResultObject (Figure 127), which holds filecompletion status information.

Notes

1. If you want to confirm that file(s) are successfully uploaded to Amazon, you can use the *getAmazonHeader()* method to get headers which is returned by Amazon S3 for a given file. You can also compare the *ETag* header, the MD5 checksum calculated by Amazon when the file is uploaded to S3, with the MD5 that you calculate for the file(s).
2. If you set the success_*action_status* to *201* status code during the upload process, you can also use XML document which is returned by Amazon S3 to compare *ETag* header with MD5 check sum.

Example code:

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

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

List<cg.ResultObject>**resultObjects** = cg.SDriveTools.completeUpload(**wipIds**);

h. cancelUpload()

This method is used to cancel attachment upload operation.

```
List<ResultObject> cancelUpload(List<ID> wipIds, String objectId)
```

Parameters:

wipIds: List of Salesforce.com IDs of attachment “file” records.

objectId: Id of the parent object. You can use 15-character or 18-character Salesforce.com ID.

Return Value: The method will return a list of ResultObject (Figure 127) which holds cancel status information for each file record.

Example code:

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

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

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

i. getAmazonHeaders()

This method is intended to be used to get response headers and its values from Amazon after an upload in order to verify the successful upload of the files.

```
Map<String,String> getAmazonHeaders(String item)
```

Parameters:

item: File location/key of uploaded file.

Return Value: The method will return the map of response headers and its values (e.g. ETag)

Example code:

Map<String,String> headResponse = cg.SDriveTools.getAmazonHeaders(**uploadRequestInfos** .fileLocation);

j. initializeMultiPartUpload()

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

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

Parameters:

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

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

Example code:

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

k. copyPartMultiPartUpload()

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

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

Parameters:

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

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

partNumber: The order of uploaded part.

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

Example code:

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

Notes

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

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

to

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

l. completeMultiPartUpload()

This method is used to complete a multipart.

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

Parameters:

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

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

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

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

Example code:

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

m. deleteMultiParts()

This method is used to delete multi parts.

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

Parameters:

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

Example code:

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

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

n. abortMultiPartUpload()

This method is used to abort a multipart upload.

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

Parameters:

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

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

Example code:

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

o. inheritSharings()

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

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

Parameters:

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

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

Example code:

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

UploadRequestInfo
String fileName{get; set;} *String fileLocation{get; set;}* *String fileSize{get; set;}* *String fileType{get; set;}* *String wipFileId{get; set;}* *String signature{get; set;}* *String policy{get; set;}*

Figure 130

ResultObject
String status {get;set;}// success – fail *String errorMessage {get;set;} // null if status is success* *String wipFileId {get;set;} // to see which file failed*

Figure 131

p. Uploading Files to S-Drive (Amazon S3)

You can use SDriveTools API calls for uploading the S-Drive Attachments/Folders Files to Amazon. For this, you will need to use below methods:

- *initializeUpload()*
- *completeUpload()*
- *cancelUpload()*
- getAccessKey()
- getBucketName()
- getS3Endpoint()

Before upload, you must first initialize attachment upload. Initializing the attachment upload creates work in progress (WIP) file(s) objects (S3Object, Case File, My Example Object File, etc.) and calculates the required file information for the upload process. For initializing attachment upload, use *initializeUpload()* method.

The next step is uploading the file(s) to Amazon using html, flash, etc. upload. When you upload file(s) to Amazon, You should use the information which has been returned by *initializeUpload()* as well as the values retrieved from getAccessKey(), getBucketName() and getS3Endpoint() methods.

If upload is successful, you must complete attachment upload. Complete attachment upload means updating WIP file records created during initialize upload call and set the *WIP__c* field value as *false*. For completing attachment upload, use *completeUpload()* method.

If upload fails, you must cancel upload. Canceling upload means deleting the WIP file records. For canceling attachment upload, use *cancelUpload()* method.

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

- initializeMultiPartUpload()
- copyPartMultiPartUpload()
- completeMultiPartUpload()
- deleteMultiParts()
- abortMultiPartUpload()

Html Policy

{
"expiration": "2014-03-12T12:47:13.893Z",
"conditions":
[
{"acl": "private" },
{"bucket": "cg--81..." },
["starts-with", "$Content-Disposition", "attachment; filename"],
["starts-with", "$key", "a038..."],
{"x-amz-server-side-encryption": "AES256"},
]
}

Figure 132

Flash Policy

{
"expiration": "2014-03-12T13:34:02.884Z",
"conditions":
[
{"acl": "private" },
{"bucket": "cg--81..." },
["starts-with", "$Content-Disposition", "attachment; filename"],
["starts-with", "$key", "a038..."],
{"success_action_status": "201" },
["starts-with", "$Filename", ""],
["starts-with", "$Content-Type", ""],
{"x-amz-server-side-encryption": "AES256"},
]
}

Figure 133

Exceptions and Reasons for Upload Operations

1. **[SDriveException]***"Parent Folder IDs must be the same for all file records that are being uploaded".*
   [Reason] If Parent__c values which are passed in with the SObjects are not same for all S3Object.
   [Solution] Give the parent folder ids the same for all S3Objects.

2. **[SDriveException]***"A file with the same name exists in the target folder (fileName) ".*
   [Reason] This exception occurs if a file with the same name exists in the same folder for S3Objects.The same file name condition holds when the file is not a WIP (WIP__c =false) file or the file is a WIP file (WIP__c =true) with the same file namebutithasbeenuploadedbyanotheruserlessthan12 hours ago.
   [Solution]Upload files with different file names or delete the previously existing files before the upload.

3. **[SDriveException]***"Error occurred while checking the files to upload! File Name, File Size cannot be blank (fileName)".*
   [Reason]If the file name or file size fields that have been passed in with the SObject are null or empty.
   [Solution]File name and file size is required for upload. Thus, pass non-blank values in with the SObject.

4. **[SDriveException]***"Name cannot start with a space or a dot and cannot contain any of the following characters: \\ /: *? \" < > | ~ (fileName)".*
   [Reason]If the file name is invalid. Invalid name means, file name starts with a spaceor a dot and contains any of the following characters: *\ / : * ? \" < > | ~*
   [Solution]Do not upload a file with the name starting with space or a dot and contain any of the following characters: *\ / : * ? \" < > | ~*

5. **[SDriveException]***"You cannot upload a zero-length file (fileName)".*
   [Reason] If the file size is 0.
   [Solution] Upload files that are greater in size than zero.

6. **[SDriveException]***"Files greater than (maxFileSize) cannot be uploaded. Please contact your system administrator for the file size limits! (fileName)".*
   [Reason]File being uploaded has a size greater than the maximum file size limit (MAX_FILE_SIZE configuration in S-Drive Configuration page).
   [Solution]Do not upload files whose size greater than MAX_FILE_SIZE. Or Increase the MAX_FILE_SIZE configuration in S-Drive Configuration page.

7. **[SDriveException]**“*Invalid parent id specified. Check your function parameters!*”.
   [Reason] If object (parent) id, which is passed as a parameter, is not a Salesforce.com 15 or 18 characters long ID.
   [Solution]Pass 15-character or 18-characterSalesforce.com ID as objectId parameter.

Error Messagesof *ResultObject* and Reasons

1. **[errorMessage]**“*Wip Id is null!* ”.
   [Reason] If wipId in the wipIds list parameter is null.
   [Solution] Do not pass null Salesforce.com IDs of file objects.

2. **[errorMessage]**“'*No such wip file with provided id: (wipId)* “.
   [Reason]If wipId in wipIds list is not available.
   [Solution]Pass correct and available Salesforce.com ids of files objects.

3. **[errorMessage]**“*There is no wip files*”.
   [Reason]If all of wipId in wipIds list is null or wipIds’ size is 0.
   [Solution]Pass wipIds with length greater than0 and non-null string values.

4. **[errorMessage]**“ *Insufficient Privileges. You do not have not access to update operation*”.
   [Reason]If Object-level security for update access is not allowed.
   [Solution] Make sure that update access is allowed for your profile.

Html upload example:

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

<script type="text/javascript">

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

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

function htmlUpload()
{
    var fd = new FormData();
    fd.append('key', '{!uploadRequestInfos.fileLocation}');
    fd.append('AWSAccessKeyId', '{!accessKey}');
    fd.append('acl', 'private');
    fd.append('policy', '{!uploadRequestInfos.policy}');
    fd.append('signature', '{!uploadRequestInfos.signature}');
    fd.append('x-amz-server-side-encryption', 'AES256');
    fd.append('Content-Disposition', 'attachment; filename=\"'+ '{!uploadRequestInfos.fileName}' +'\"');

    fd.append("file",uploadFile);

    var xhr = new XMLHttpRequest();
    xhr.addEventListener("load", htmlUploadComplete, false);
    xhr.addEventListener("error", htmlUploadFailed, false);
    xhr.open('POST', 'https://s3.amazonaws.com/'+'{!bucketName}', true);

    xhr.send(fd);
}
```



```
function htmlUploadComplete(evt)
{
	//Call completeUpload()  method
}

function htmlUploadFailed(evt)
{
	//Call cancelUpload() method
}
</script>
```

You can see the appropriate values for the request parameters below (Figure 134).

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

Figure 134

R. S-Drive Support

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

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

2. Email: sdrive@sdriveapp.com

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