



# **S-Drive**

## **Installation Guide**

### **v1.26**

#### ***Important Note***

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



[www.cyangate.com](http://www.cyangate.com)

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1. Go to **S-Drive Website** ([sdriveapp.com](https://sdriveapp.com)). Click "**Get S-Drive**" button. **S-Drive Product Page** will be opened. And click "**Get It Now**" (Figure 2 and Figure 2).



Figure 1



Figure 2

2. Click "**Login to the AppExchange**" to login using your Salesforce credentials. If you don't have a login, click "**I don't have a login**" to continue as a guest and apply for a free trial Salesforce account. Note that **"even if you plan to install S-Drive into your sandbox, first you need to login to the AppExchange using your production credentials"** (Figure 3).

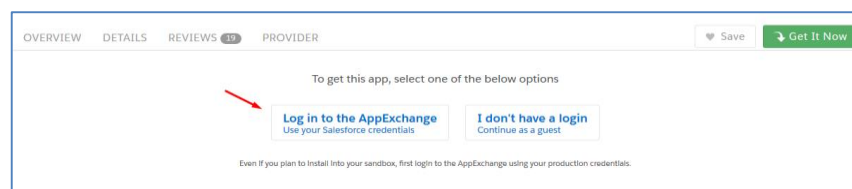


Figure 3

3. After login you'll be asked where to install: "**Install in production**" or "**Install in sandbox**". Select the appropriate option based on your needs (Figure 4).

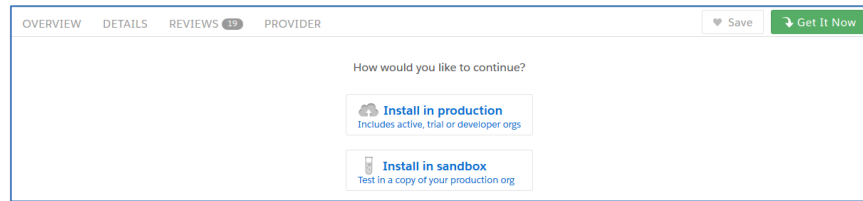


Figure 4

- Review **"What You Are Installing"** and **"Where You Are Installing"** sections in the next screen. Read the **"terms and conditions"** and then check **"I have read and agree to the terms and conditions"** checkbox and click **"Confirm and Install!"** button. (Figure 5).

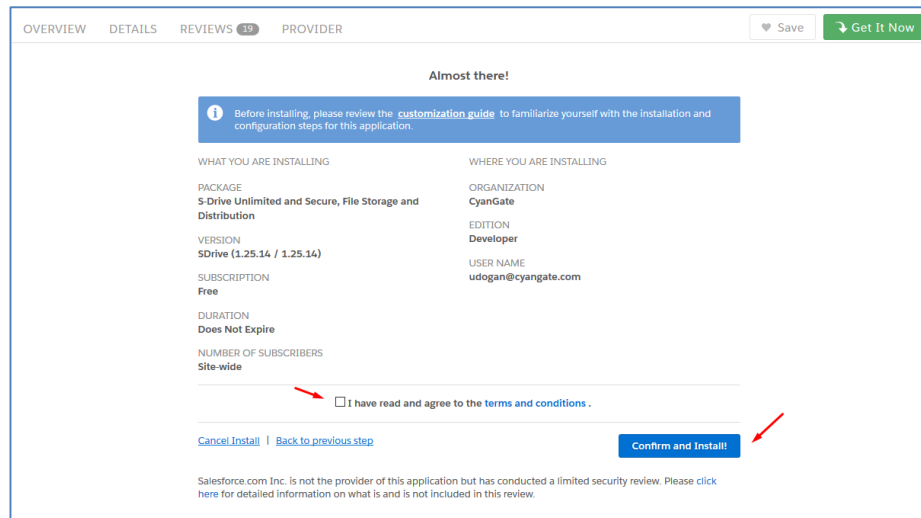


Figure 5

- Login to your production (or sandbox organization based on your previous selections) account again in the next screen.
- Select **"Install for All Users"** and click **"Install"** button in the next screen (Figure 6).

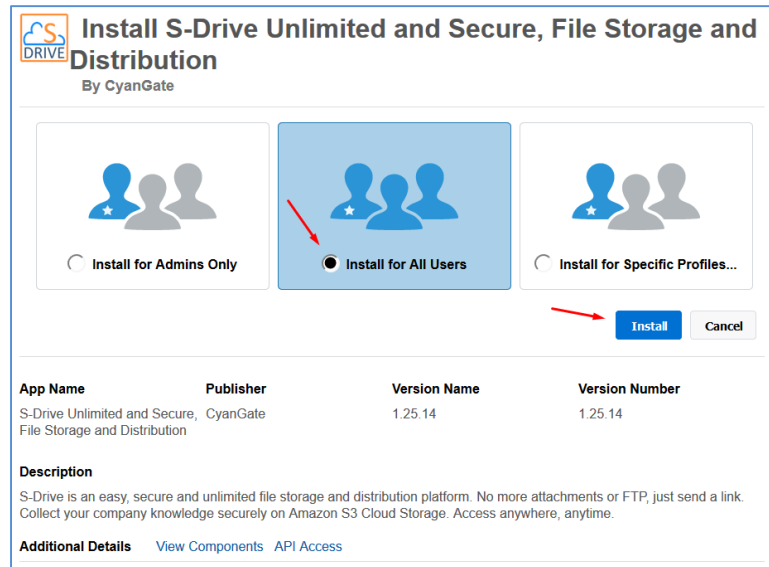


Figure 6

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

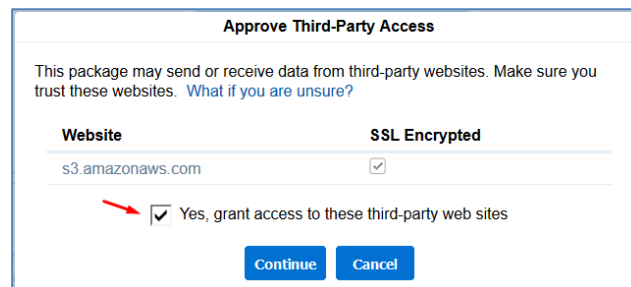


Figure 7

8. If you see **"Install Complete"** screen, click **"Done"** button (Figure 8). You can continue with the **'Displaying "S-Drive" and "S-Drive Configuration" Tabs'** section.

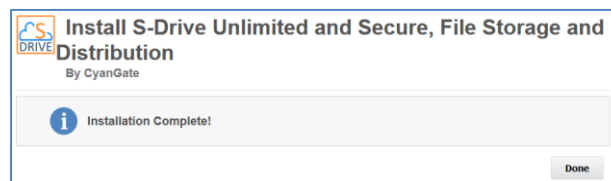


Figure 8

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

1. To display "S-Drive" and "S-Drive Configuration" tabs in your custom app (e.g. "Sales" app), go to "Setup -> Personal Setup -> My Personal Information -> Change My Display". Click "Customize My Tabs" button (Figure 9).

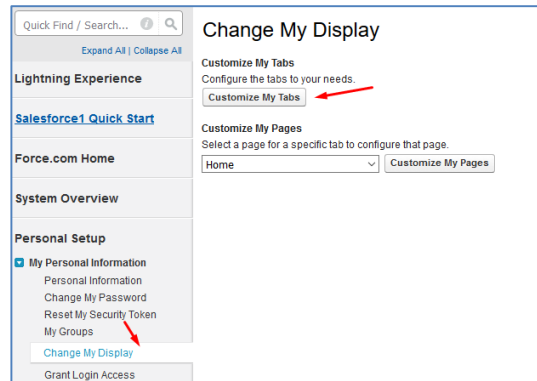


Figure 9

2. Select your custom app from the "Custom App" drop down menu (e.g. "Sales" app). Move "S-Drive" and "S-Drive Configuration" tabs from "Available Tabs" box to "Selected Tabs" box by selecting and clicking the right arrow as shown below. Click "Save" (Figure 10).

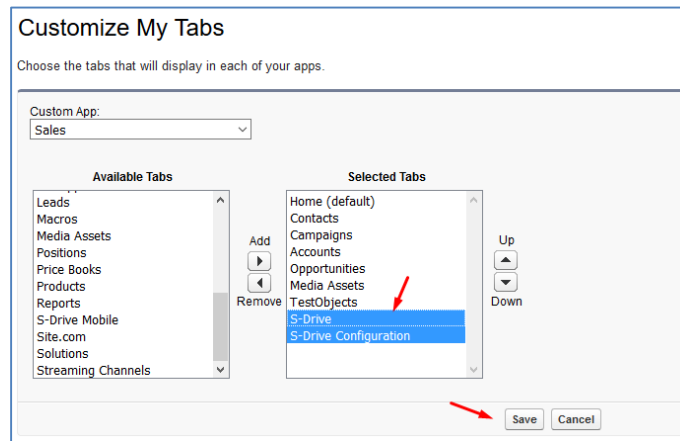
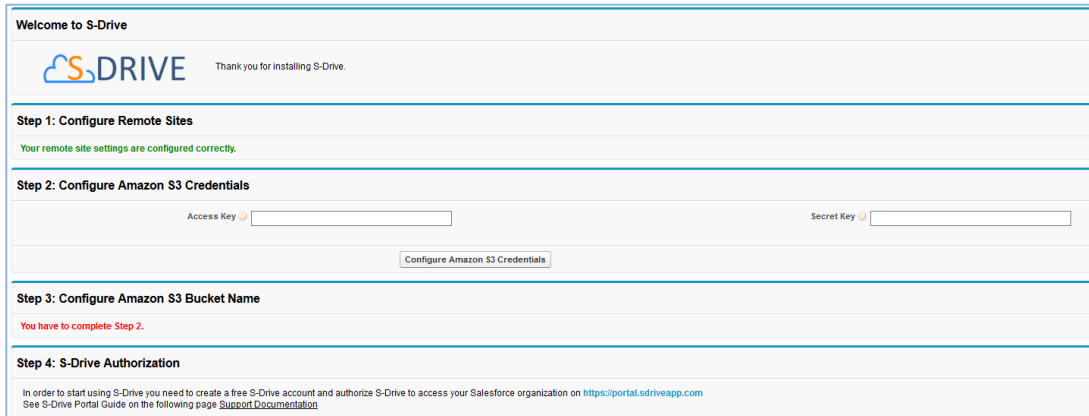



Figure 10

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

1. **Step 1: Configure Remote Sites:** If Remote Site Settings are configured correctly, you'll see "**Your remote site settings are configured correctly**" message under the "**Step 1: Configure Remote Sites**" section (Figure 11). If you see an error message in Step 1, resolve the issue by following the on-screen instructions (Figure 12).



Welcome to S-Drive

 Thank you for installing S-Drive.

**Step 1: Configure Remote Sites**

Your remote site settings are configured correctly.

**Step 2: Configure Amazon S3 Credentials**

Access Key  Secret Key

[Configure Amazon S3 Credentials](#)

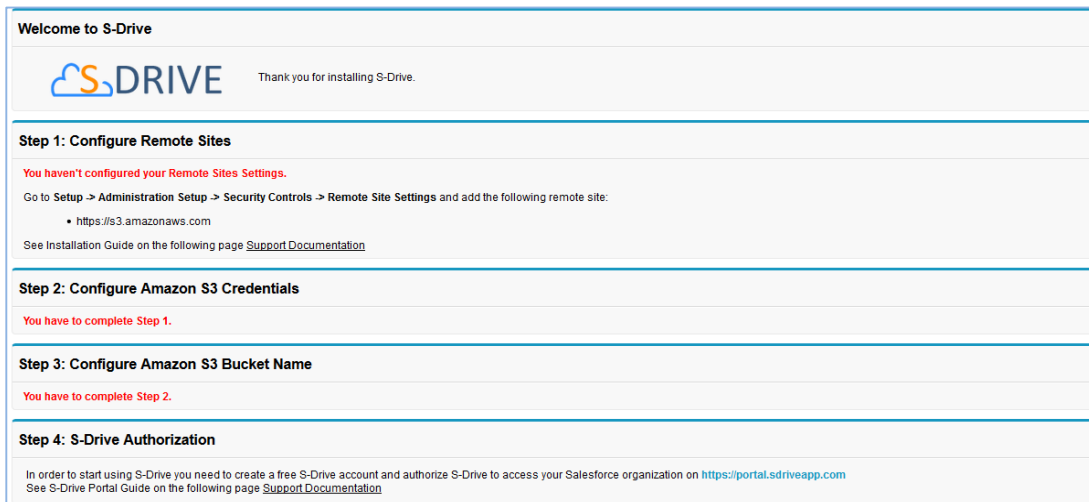
**Step 3: Configure Amazon S3 Bucket Name**

You have to complete Step 2.


**Step 4: S-Drive Authorization**

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on <https://portal.sdriveapp.com>  
See S-Drive Portal Guide on the following page [Support Documentation](#)

Figure 11



Welcome to S-Drive

 Thank you for installing S-Drive.

**Step 1: Configure Remote Sites**

You haven't configured your Remote Sites Settings.

Go to Setup -> Administration Setup -> Security Controls -> Remote Site Settings and add the following remote site:

- <https://s3.amazonaws.com>

See Installation Guide on the following page [Support Documentation](#)

**Step 2: Configure Amazon S3 Credentials**

You have to complete Step 1.

**Step 3: Configure Amazon S3 Bucket Name**

You have to complete Step 2.

**Step 4: S-Drive Authorization**

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on <https://portal.sdriveapp.com>  
See S-Drive Portal Guide on the following page [Support Documentation](#)

Figure 12

2. **Step 2: Configure Amazon S3 Credentials:** This step is required to connect your Amazon S3 account with S-Drive. You need to type valid "**Amazon Secret Key**" and "**Access Key**". After providing keys, click "**Configure Amazon S3 Credentials**" button (Figure 11). If you see "**Amazon S3 Credentials are configured correctly.**" message under "**Step 2: Configure Amazon S3 Credentials**" section (Figure 13), you can continue with "**Step 3: Configure Amazon S3 Bucket Name**".

Welcome to S-Drive

**Step 1: Configure Remote Sites**  
Your remote site settings are configured correctly.

**Step 2: Configure Amazon S3 Credentials**  
Amazon S3 Credentials are configured correctly.  
Access Key: [masked] Secret Key: [masked]

**Step 3: Configure Amazon S3 Bucket Name**  
☐ Use my bucket  
☒ Create a new bucket  
 Bucket Name: [text field]  
 Region Name: [dropdown menu with options: US East (N. Virginia), US East (N. Virginia), US West (Oregon), US West (N. California), EU (Ireland), Asia Pacific (Singapore), Asia Pacific (Tokyo), Asia Pacific (Sydney), South America (São Paulo)]  
 [Configure Amazon S3 Bucket Name button]

**Step 4: S-Drive Authorization**  
In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on <https://portal.sdriveapp.com>  
See S-Drive Portal Guide on the following page [Support Documentation](#)

Figure 13

**Important Note:** IAM users whom assigned individual security credentials, must have some permissions to activate and use S-Drive. The minimum policy example can be seen in **Minimum Policy Example** section. Please apply this policy if you are planning to use this kind of user for the activation.

- Step 3: Configure Amazon S3 Bucket Name:** This is the bucket that will be used to store your files in your Amazon S3 account. Bucket name must be unique and must comply with DNS naming conventions. *Also do not use - (dash) character in your bucket names.*

You can select "**Use my bucket**" or "**Create a new bucket**" option.

If you select "**Create a new bucket**" option (Figure 13), you need to provide a valid bucket name and select the region name to create the bucket on this endpoint location.

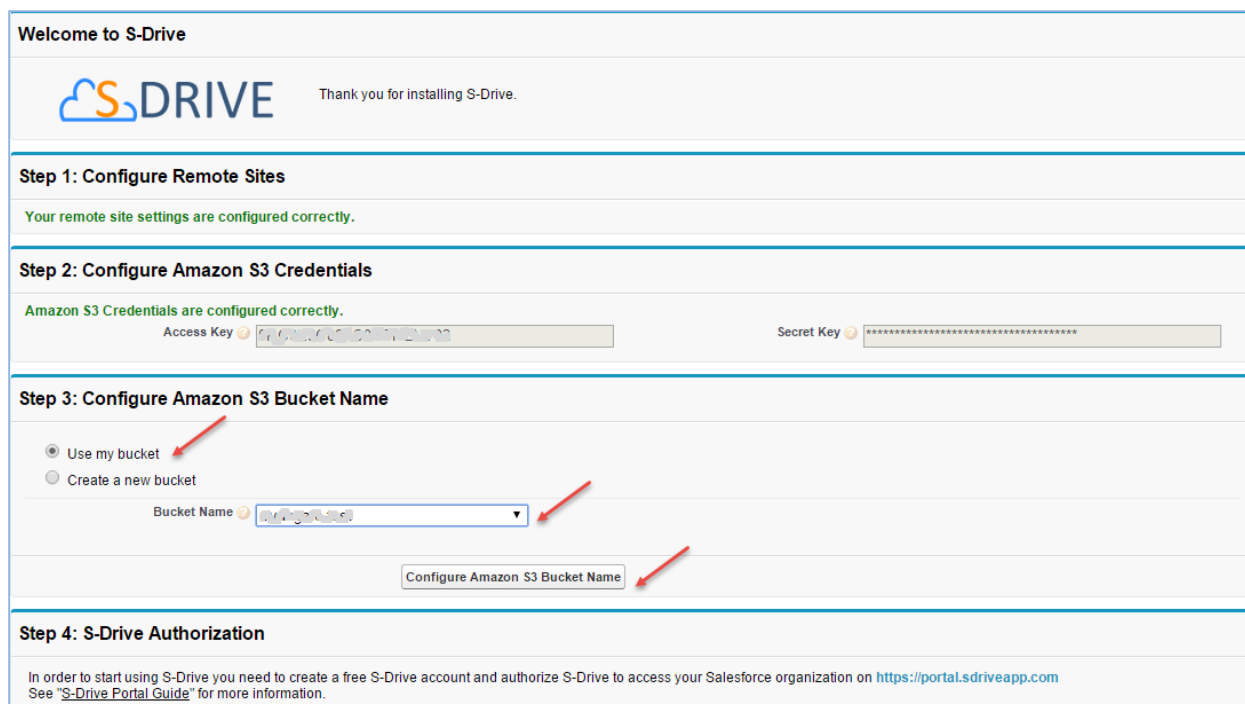
If you select "**Use my bucket**" option (Figure 14), you must select one of the bucket names from the list (that is retrieved from your Amazon S3 account).

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


**Important Note:** If you are planning to use **S-Drive Versioning** feature, we strongly suggest you to use a "**versioning never enabled bucket**". To ensure versioning status of your bucket, sign in to your amazon console, find your bucket from S3 service and check bucket properties. If you selected "**Create a new bucket**" option, you can ignore this note as it will create a "versioning not enabled" bucket by default.



Click "**Configure Amazon S3 Bucket Name**" button (Figure 13) (Figure 14). If you see "**Amazon S3 Bucket Name is configured correctly.**" message under "**Step 3: Configure S3 Bucket Name**" section (Figure 15), you can continue with "**Step 4: S-Drive Authorization**".



Welcome to S-Drive


 Thank you for installing S-Drive.


**Step 1: Configure Remote Sites**

Your remote site settings are configured correctly.


**Step 2: Configure Amazon S3 Credentials**

Amazon S3 Credentials are configured correctly.


Access Key 


Secret Key 

**Step 3: Configure Amazon S3 Bucket Name**

☒ Use my bucket 

☐ Create a new bucket

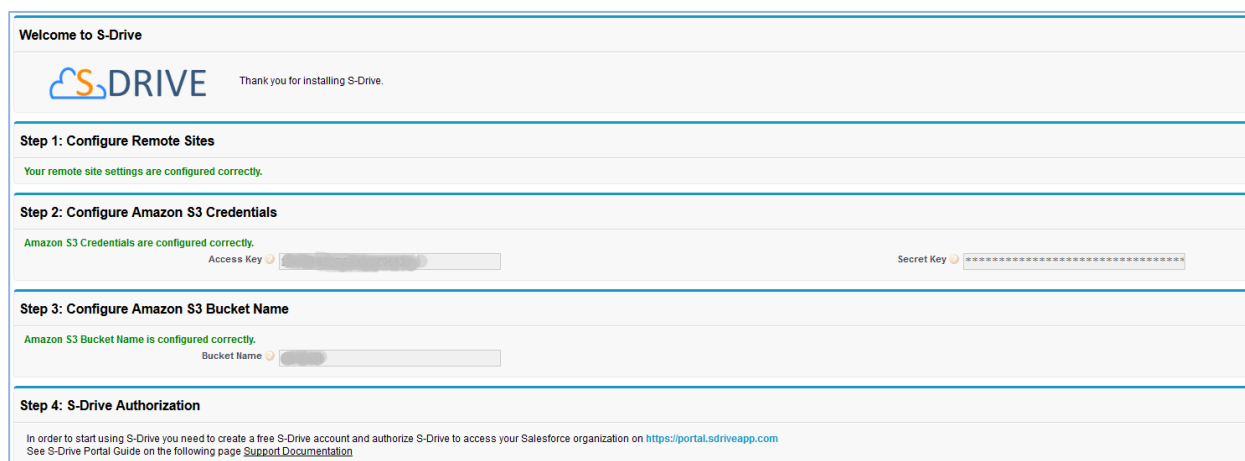
Bucket Name 




**Step 4: S-Drive Authorization**

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

Figure 14



Welcome to S-Drive


 Thank you for installing S-Drive.


**Step 1: Configure Remote Sites**

Your remote site settings are configured correctly.

**Step 2: Configure Amazon S3 Credentials**


Amazon S3 Credentials are configured correctly.

Access Key 

Secret Key 

**Step 3: Configure Amazon S3 Bucket Name**

Amazon S3 Bucket Name is configured correctly.

Bucket Name 

**Step 4: S-Drive Authorization**

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on <https://portal.sdriveapp.com>  
See S-Drive Portal Guide on the following page [Support Documentation](#)

Figure 15

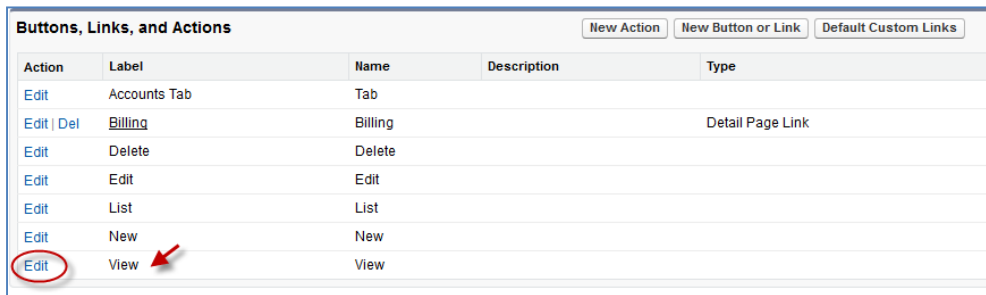
- Step 4: S-Drive Authorization:** You need to go to [portal.sdriveapp.com](https://portal.sdriveapp.com) to complete this step (Figure 15). Go to [portal.sdriveapp.com](https://portal.sdriveapp.com) and create a free S-Drive account and authorize S-Drive to connect to your organization. For more information about creating free S-Drive account and connecting your organization to S-Drive, please refer to "S-Drive Portal Guide" document.

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

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

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

1. Go to **Setup -> App Setup -> Customize -> Accounts** (or **Cases** or **Contacts** or **Opportunities** - the label of the object that you want to enable S-Drive Attachments for) -> **Buttons, Links, and Actions**. Click the **Edit** action next to the **View** label (Figure 16).



Action	Label	Name	Description	Type
<a href="#">Edit</a>	Accounts Tab	Tab		
<a href="#">Edit   Del</a>	Billing	Billing		Detail Page Link
<a href="#">Edit</a>	Delete	Delete		
<a href="#">Edit</a>	Edit	Edit		
<a href="#">Edit</a>	List	List		
<a href="#">Edit</a>	New	New		
<a href="#">Edit</a>	View	View		

Figure 16

2. Then select **Visualforce Page** for **Override With** section and pick related Visualforce page (**AccountFilePage** for Accounts, **CaseFilePage** for Cases, **ContactFilePage** for Contacts, **OpportunityFilePage** for Opportunities) from the drop-down box. Click **Save** button to complete the override (Figure 17).

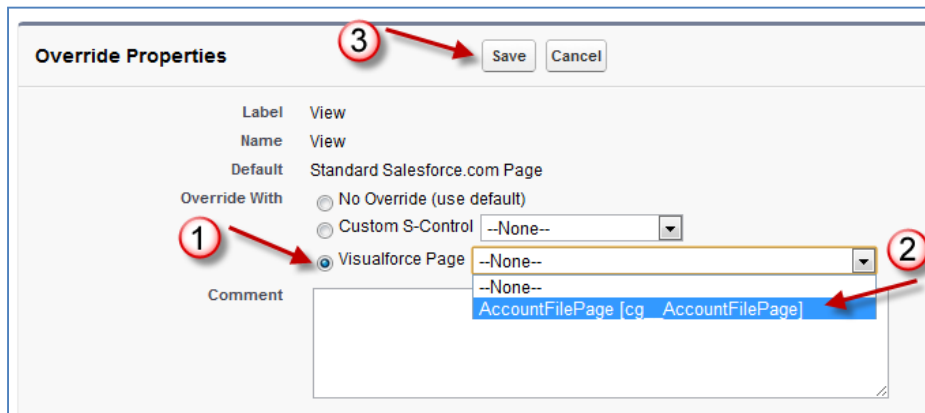
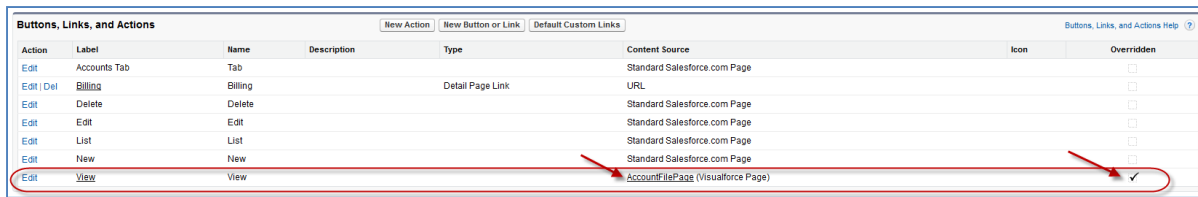


Figure 17

- Now it will display **View** as **Overridden** in the *Buttons, Links, and Actions* section (Figure 18).



Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard Salesforce.com Page		<input type="checkbox"/>
Edit   Del	Billing	Billing		Detail Page Link	URL		<input type="checkbox"/>
Edit	Delete	Delete			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	Edit	Edit			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	List	List			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	New	New			Standard Salesforce.com Page		<input type="checkbox"/>
Edit	View	View			AccountFilePage (Visualforce Page)		<input checked="" type="checkbox"/>

Figure 18

- After creating an account object, you should see "Account Files" (similar screens for Cases, Contacts and Opportunities once you configure) page block at the end of the object detail page (Figure 19). See "User Guide" for more information on how to use the buttons and functions in this page block.

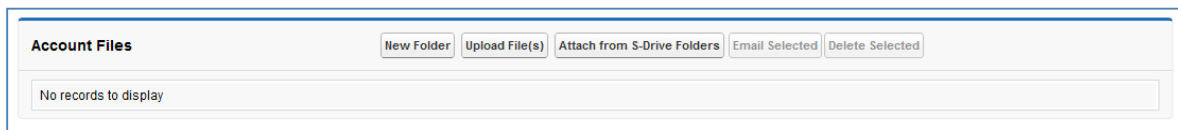


Figure 19

## E. Upgrading S-Drive

### 1. 1.24 or Newer Versions to 1.26

If you have S-Drive 1.24, 1.25 or patch releases of these versions, you can upgrade to S-Drive 1.26 by following below steps.

1. Go to <https://get.sdriveapp.com>.
2. Click **Get It Now** button.
3. Select **Log in to the AppExchange** option.
4. Provide your login credentials and click **Log in to Salesforce** button.
5. Select **Install in production** or **Install in sandbox** based on your organization needs.
6. Review **What You Are Installing** and **Where You Are Installing** sections, check **I have read and agree to the terms and conditions** and click **Confirm and Install!** button.
7. Login to the installation org (production or sandbox) by providing your login credentials and click **Log in to Salesforce** button.
8. Select **Install for All Users** option and click **Upgrade** button (Figure 20).

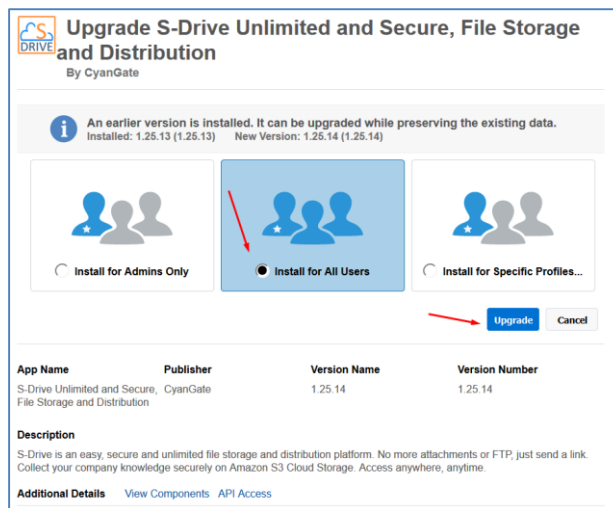


Figure 20

9. Wait while S-Drive is being upgraded and make sure you see **Upgrade Complete!** message. Click **Done** (Figure 21).

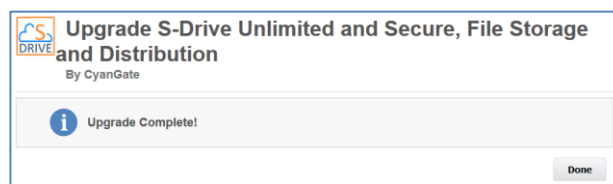


Figure 21

10. If you have already have custom objects from previous S-Drive version, you should add fields as described in following steps:

- a. Login to your Salesforce account.
- b. Go to **Setup -> Create -> Objects -> <Your Custom Object File>**.
- c. Go to **Custom Fields & Relationships** section.
- d. Create following fields one by one by clicking **New** button and following on-screen instructions.

Note: In each step you should check **Visible** checkbox for all **Field-Level Security for Profile** fields.

i. **Is Latest Version:**

1. Field Type: **Checkbox**
2. Field Label: **Is Latest Version**
3. Default Value: **Checked**
4. Field Name: **Is\_Latest\_Version**

ii. **Key:**

1. Field Type: **Text**
2. Field Label: **Key**
3. Length: **255**
4. Field Name: **Key**

iii. **Version Description:**

1. Field Type: **Text**
2. Field Label: **Version Description**
3. Length: **255**
4. Field Name: **Version\_Description**

iv. **Version Id:**

1. Field Type: **Text**
2. Field Label: **Version Id**
3. Length: **255**
4. Field Name: **Version\_Id**

11. Open **S-Drive Configuration** tab, **UpdateSDriveObjectsPage** will be opened automatically. You can also open this page from **S-Drive Configuration Tab > General Settings Section > Click Here to Update S-Drive Objects** Link.

12. Check all **Set Fields** check boxes and click **Update** button (Figure 22).

**Important Note:** *UpdateSDriveObjectsPage* is used to populate Key value into Key fields of your old S-Drive records. This page lists all S-Drive related objects which you uploaded files before upgrading to version 1.26. Then the page populates Key values when you check "Set Fields" and click "Update" button. Key is a new property comes with version 1.26 and all file records must have a Key value.

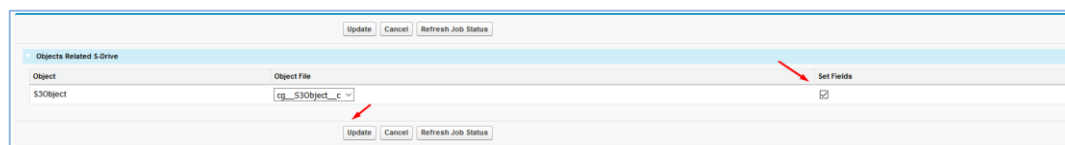


Figure 22

13. If you would like to use **S-Drive Versioning** feature, open **S-Drive Configuration** tab and click **Enable Versioning** button to activate version upload feature.

**Important Note:** *If you enable versioning you can't disable it later.*

14. Now you can create folders, upload files and also use versioning feature with your custom objects using S-Drive 1.26.

## 2. 1.23.11 or Older Versions to 1.26

**Important Note:** Upgrading **1.23.11 or older versions** to S-Drive 1.26 requires manual migration steps. You need to contact S-Drive support ([sdrive@sdriveapp.com](mailto:sdrive@sdriveapp.com)) to migrate your data to the latest version.

If you try to upgrade 1.23.11 or older versions to 1.26, you'll get "The post install script failed" error message (Figure 23).

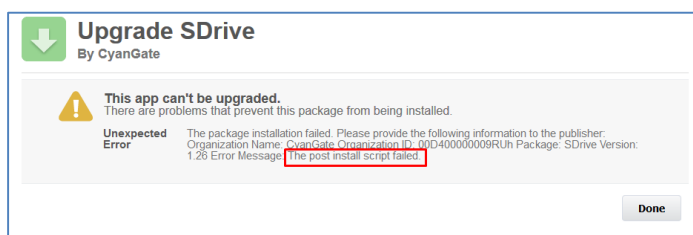


Figure 23

## F. Minimum Policy Example

To apply policy to your restricted user:

1. Sign in to [AWS Management Console](#) and click **"IAM"** from Services menu.
2. Click **"Policies"** on the dashboard and then click **"Create Policy"** button.
3. Select **"Create Your Own Policy"** on the screen.
4. Type name into **"Policy Name"** area. Copy contents of the below example and paste into **"Policy Document"** area on AWS Console. Update ***sdrivebucket*** bucket name references in policy document and click **"Create Policy"**.

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

5. Click **"Users"** on the dashboard and click on your user name. Then Click **"Attach Policy"** button on the screen for the user that you use in S-Drive.
6. Find the policy which you created in #4 and click **"Attach Policy"** button.

## G. S-Drive Advanced Configuration

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

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

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



## H. Troubleshooting Tips

1. **[Problem]** I'm getting "*Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://s3.amazonaws.com/?.....*" error.  
**[Solution]** You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: ***https://s3.amazonaws.com***
  
2. **[Problem]** My mail message contains "?????" for some language-specific characters in email clients (Outlook, Thunderbird etc.).  
**[Solution]** Go to **Setup -> Personal Setup -> My Personal Information -> Personal Information**. Edit **User Detail** and set **Email Encoding** to **Unicode (UTF-8)**.
  
3. **[Problem]** Salesforce sharing is not working.  
**[Solution]** Sharing is **only** supported for **S-Drive Folders**. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.
  
4. **[Problem]** Percent character (%) is replaced with an underscore character (\_) while downloading.  
**[Solution]** This is a technical limitation.
  
5. **[Problem]** Some special characters (e.g. ě, š, ě) can't be typed into text fields on Apple Macintosh.  
**[Solution]** This is a limitation related to Flash Player's Macintosh version. This issue will be addressed in later releases.
  
6. **[Problem]** Special characters in file names are URL encoded for Firefox browser.  
**[Solution]** This is a limitation of Firefox.
  
7. **[Problem]** If a sub folder is deleted parent folder's (+) sign stays there until clicked Home and refreshed.  
**[Solution]** You need to refresh the S-Drive tab.
  
8. **[Problem]** If folder has no sub folders, tree's folder icon is closed whether we click on it or not.  
**[Solution]** This is only a visual problem and it will not affect the operation of the application.

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

1. Open a Ticket at Support Site: [sdriveapp.com/support](https://sdriveapp.com/support)
2. Email: [sdrive@sdriveapp.com](mailto:sdrive@sdriveapp.com)

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