CyanGate

S-DRIVE S-Drive Quick Reference Guide v1.27

1. 'S-Drive Folders' Tab

'S-Drive Folders' tab has three panels: *Folders* panel (Figure 1-1) displays folder structure. *Toolbar* panel (Figure 1-2) includes buttons required for *creating folders; uploading, downloading, emailing, deleting, copying, and moving files and a search box*. *Current Folder View / Search Results View* (Figure 1-3) displays all files and subfolders inside the selected folder or based on a search accordingly. *Actions* column in the current folder view has file and folder basis actions like *Download*, Share, Rename, *Edit Description*, *Copy URL to Clipboard*, and *Delete*.
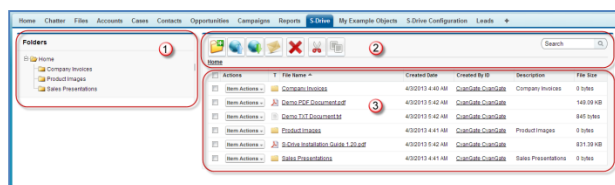
Figure 1

a. Creating Folders

Click '*New Folder'* button ( ) from the toolbar. Type the folder name and then click 'OK' button to create a folder (Figure 2). Folder names cannot be blank, cannot start with a space or a dot and cannot contain **'\', '/', ':', '*', '?', '"', '<', '>', '|'**characters.
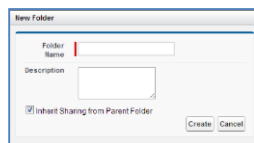
Figure 2

b. Uploading Files

Click '*Upload File(s)'* button ( ) from the toolbar. Based on the configuration HTML Upload Widget (Figure 3) or Java Upload Widget (Figure 4) or Flash Upload Widget (Figure 5) will be displayed as a popup or in a new page. You can switch between widgets using the *"Switch to Flash Upload"/"Switch to Java Upload"* links at the bottom right corner of the widgets (Java/Flash). We suggest to use HTML Widget or Java Widget for large file uploads.

Select file(s) to upload by clicking *'Add file(s)'* button ( ). Browse and select files by clicking *'Open'* button to add files to the upload list. You can organize upload list using *'Add file(s)'* ( ) and *'Remove file(s)'* ( ) buttons. Click '*Upload file(s)'* button ( ) to start uploading selected files. Upload progress will be displayed in the *'Upload Progress Bar'*. Status of the uploaded file will be updated to *'COMPLETED'* (Figure 5).
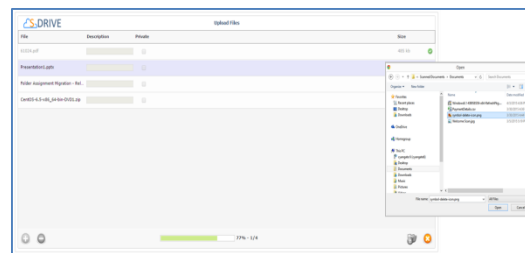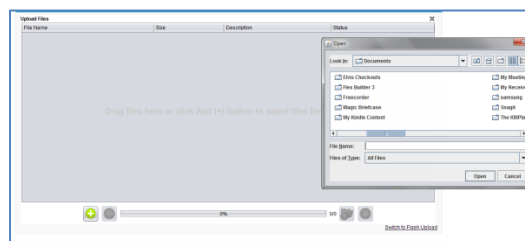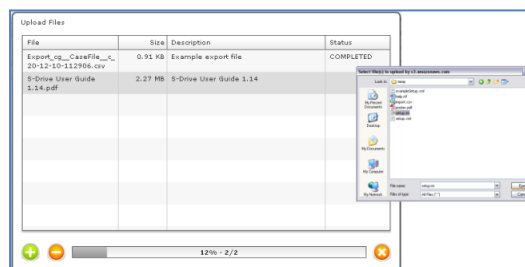
Figure 3

Figure 4

Figure 5

c. Uploading New Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu (Figure 6). Only HTML Upload Manager supports version upload.
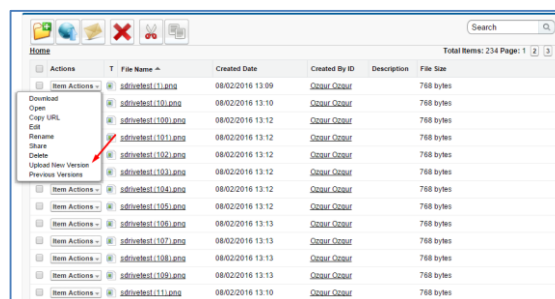
Figure 6

d. Previous Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can see previous versions of a file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown. (Figure 7).
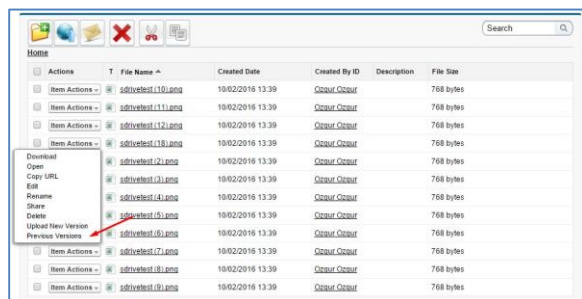

Figure 7

You can set a version of a file as current version by clicking "Item Actions" button under "Actions" column and selecting **"Set Current"** action menu item from dropdown. (Figure 8)
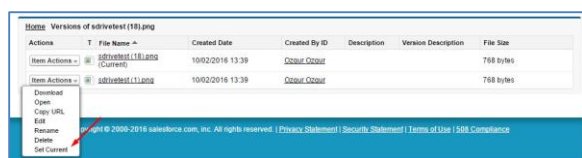

Figure 8

e. Emailing Files

Select file(s) and then click *'Send Email'* button ( ) to email files. You can type a contact name into 'To' address or you can select it searching over your contacts by clicking 'Lookup' button. You can select or type 'Additional To', 'CC', and 'BCC' fields using appropriate fields and buttons. *'Attachment Expiration'* is used to set the expiration time for the attached files. Default is *'Never Expires'*. If you uncheck *'Never Expires'*, other options will appear. 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. You can display and hide attachment details using *'Details'* buttons. You can remove individual attachments from email by clicking *'-'* icon next to the file name in the *'Details'* section. Type your email's subject and message body or select a preconfigured template using "Select Template" button, then click 'Send' button to send the email (Figure 9). You'll get success message if mail is sent correctly. Note that you cannot email folders.
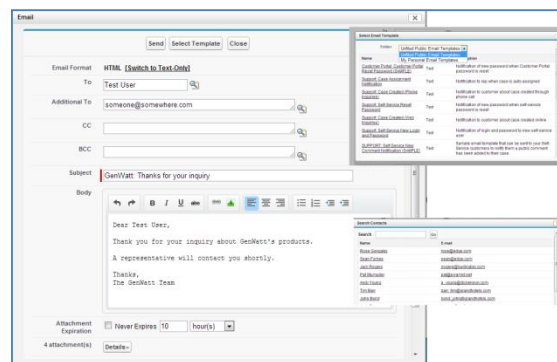

Figure 9

f. Deleting Files/Folders

Select files/folders and then click *'Delete File(s)'* button ( ) to delete files or folders. You can delete files/folders one-by-one using *'Delete'* action menu item from the Actions column of the selected file/folder. You'll be asked *'Are you sure?'* after clicking *'Delete'* button. Select *'Yes'* option to delete files/folders (Figure 10). You cannot delete folders that contain files or subfolders. If you have versions under the current file, all versions of this file will also be deleted.
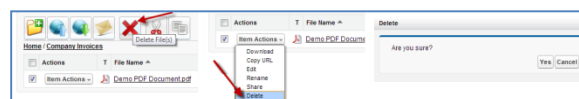

Figure 10

g. Downloading Files

To download a single file with one click, select a file and then click *'Download'* action menu item from the Actions column of the selected file. Select a folder to save the file to your computer and click *'Save'* button to start downloading. Your download will be controlled by your internet browser (Figure 11). Note that you cannot download folders.
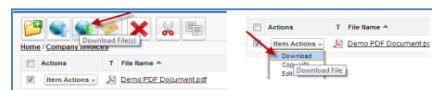

Figure 11

To download files using *'Download Manager'*, select files and then click *'Download File(s)'* button (Figure 12-a). 'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear downloads and change the download target folder from 'Download Manager' screen (Figure 12-b). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.
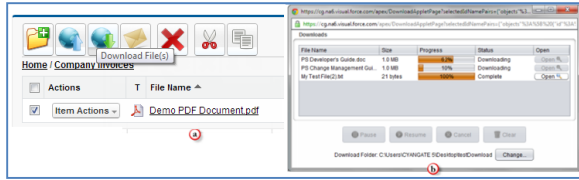
Figure 12

h. Copying and Moving Files

Select file(s) you want to copy and click *'Copy'* button ( ), browse to the target folder that you want to paste the file(s), and click 'Paste' button ( ). If versioning enabled and you have versions of the selected file, only latest version of the file will be copied.

Select file(s) you want to move and click *'Cut'* button ( ), browse to the target folder that you want to paste the file(s), and click *'Paste'* button ( ). If versioning enabled and you have versions of the selected file, file will be cut/moved with all its versions.

If sharing is enabled it will ask if you want to bring the current shares with the cut/copied item. Progress window will be displayed and files will be copied or moved to the target folder (Figure 13). Note that copy/move operations are not allowed on folders.
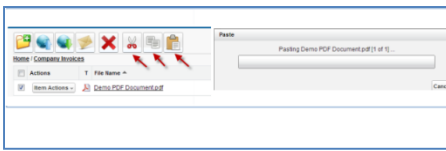

Figure 13

i. Renaming Files/Folders

Click the "Item Actions" menu of the file or folder you want to rename and select *'Rename'* from the list. Type in the new name in the pop-up and click *'Save'* button (Figure 14).
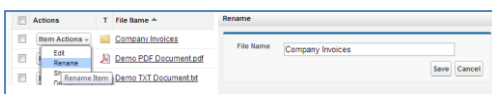

Figure 14

j. Editing File/Folder Description

Click the "Item Actions" menu of file or folder you want to edit its description and select *'Edit'* from the list. Type in the new description in the pop-up and click *'Save'* button (Figure 15).
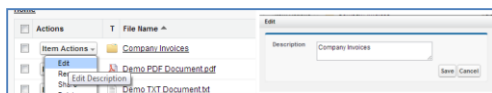

Figure 15

k. Copying URL to Clipboard

For copying URL of a file to clipboard, click the "Item Actions" menu of the file then select *'Copy URL'* from the list. Follow the on-screen instructions and copy the URL (Figure 16). Now you can paste the URL.
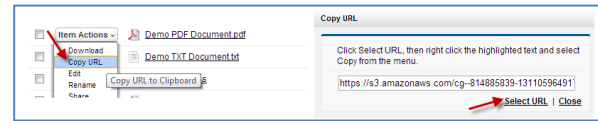

Figure 16

l. Sharing Files & Folders

You can list shares on the file, add new shares for files and folders to users/groups/roles etc., edit/delete current shares using "Share" item menu action of the "Item Actions" menu. See "S-Drive User Guide" for detailed information.
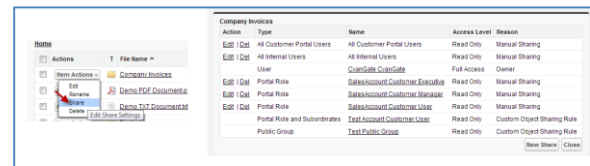

Figure 17

m. Searching S-Drive Folders

You can search for files and folders inside S-Drive Folders (Figure 18).

To start a search, type the search criteria to the right corner of S-Drive Folders screen, 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. '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.
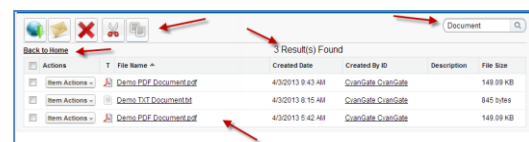

Figure 18

2. 'S-Drive Attachments' Screen

'S-Drive Attachments' is the object (such as cases, accounts, etc.) 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. You can browse into the folders by using the current folder information holder and search for files and folders (Figure 19).
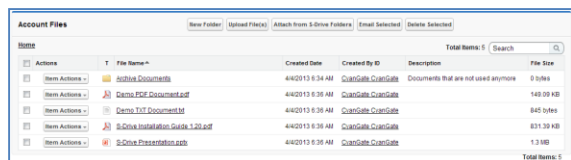

Figure 19

'S-Drive Attachments' has three sections: *'Buttons'* (Figure 20), *'Navigation Panel and Search Box'* (Figure 21) and 'Attachments' (Figure 22).

'Buttons' section has 'New Folder', 'Upload File(s)', 'Attach from S-Drive Folders', 'Email Selected', 'Delete Selected', and 'Download Manager' buttons (Figure 20).
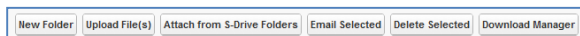

Figure 20

'Navigation Panel and Search Box' has navigation panel to easily browse between folders, total items/pagination for the selected object and a search box to search files and folders (Figure 21).
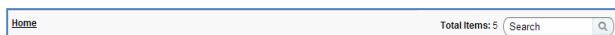

Figure 21

'Attachments' section has the list of attachments and folders. This list has 'Actions', 'File Name', and customizable field columns (default 'File Size', 'Created By', 'Created Date', and 'Description') for each file (Figure 22).
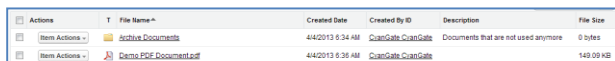

Figure 22

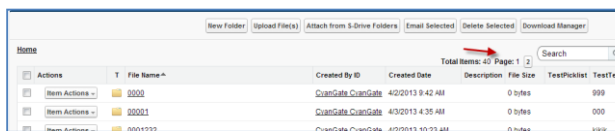'Attachments' section may display the list of attachments in pages based on your configuration (Figure 23).

Figure 23

n. Creating Folders

Click '*New Folder'* button to create a folder for the selected object (Figure 20).

Once you click the button, 'New Folder' screen will be displayed. Type in the folder name and click 'Create' button to create the new folder (Figure 24).
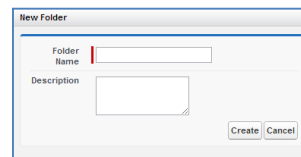

Figure 24

You can browse between folders using the current folder information holder, above the 'Actions' column (Figure 25).
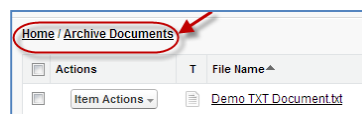

Figure 25

o. Uploading Attachments

Click '*Upload File(s)'* button at the top level or inside a folder to upload files. (Figure 20).

Based on the configuration Java Upload Widget (Figure 4) or Flash Upload Widget (Figure 5) will be displayed as a popup or in a new page. You can switch between widgets using the *"Switch to Flash Upload"/"Switch to Java Upload"* links at the bottom right corner of the widget. We suggest to use Java Widget for large file uploads.

You can follow the same steps described in *'1-b. Uploading Files'* section to upload files into 'S-Drive Attachments'.

p. Uploading New Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can upload new version of file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu (Figure 27). Only HTML Upload Manager supports version upload.
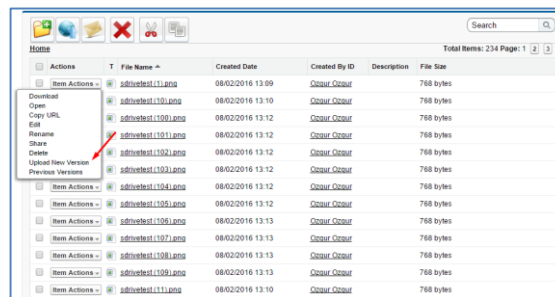

Figure 26

q. Previous Versions of File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can see previous versions of a file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown. (Figure 27).
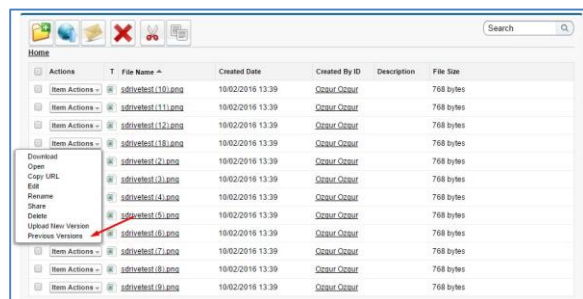

Figure 27

You can set a version of a file as current version by clicking "Item Actions" button under "Actions" column and selecting **"Set Current"** action menu item from dropdown. (Figure 28)
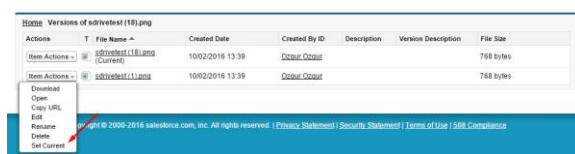

Figure 28

r. Attaching Files from S-Drive Folders

Click *'Attach from S-Drive Folders'* button to attach files from *'S-Drive Folders'* (Figure 20). This will bring the 'S-Drive Folders' screen with two additional buttons: *'Attach File(s)'* and *'Cancel Attach'* (Figure 29). Once the 'S-Drive Folders' screen is opened you can select files and click 'Attach File(s)' button to attach selected files to the selected object as attachments. Attaching is a copy process, so copy of the attached file will be created for the selected object. Only current file will be attached if you have versions under the file.
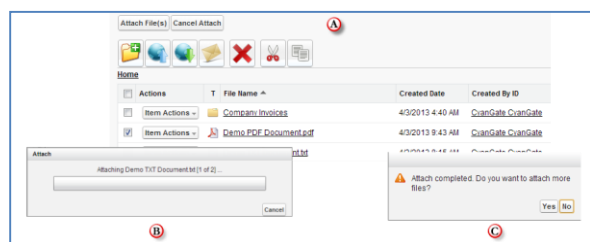

Figure 29

s. Emailing Selected Attachments

Select one or more files using checkboxes next to each file. Click *'Email Selected'* button to email selected files (Figure 30). This will bring the 'Email Screen' described in *'1-c. Emailing Files'* section.
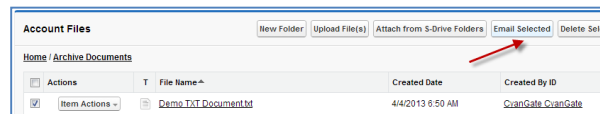

Figure 30

t. Deleting Selected Attachments

Select one or more files using checkboxes next to each file. Click *'Delete Selected'* button to delete selected files from *'S-Drive Attachments'* (Figure 31). Alternatively, you can delete files one by one using the 'Delete' action menu item in the *'Actions'* column of the selected file after clicking the 'Item Actions' button. If you have versions under the current file, all versions of this file will also be deleted.

u. Downloading Selected Attachments

You can download a single *'S-Drive Attachment'* by clicking *'Download'* action menu item in the *'Actions'* column of the selected file (Figure 31).
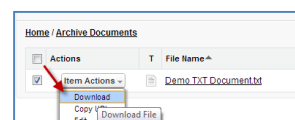

Figure 31

You can download multiple *'S-Drive Attachments'* by selecting files and then clicking *'Download Manager'* button. Note that you cannot download folders (Figure 32)*.*
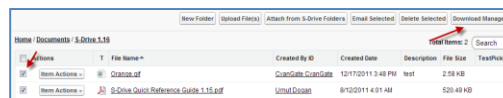

Figure 32

'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear downloads and change the download target folder from 'Download Manager' screen (Figure 33). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.
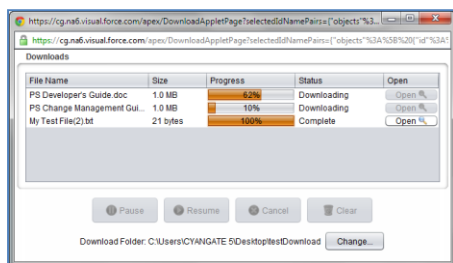
Figure 33

v.   Copying URL of a Selected Attachment

You can copy URL of an *'S-Drive Attachment'* by clicking *'Copy URL'* action menu item in the *'Actions'* column of the selected file.

w.   Editing Fields of a Selected Attachment

You can edit fields of an *'S-Drive Attachment'* or a folder by clicking *'Edit'* link in the *'Actions'* column of the selected file.

x.   Renaming Files/Folders

Click the "Item Actions" menu of the file or folder you want to rename and select *'Rename'* from the list. Type in the new name in the pop-up and click *'Save'* button (Figure 34).
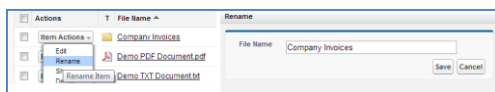

Figure 34

y.   Searching S-Drive Attachments

You can search for files and folders inside S-Drive Attachments (Figure 35).

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.
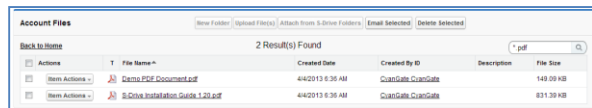

Figure 35

z.   iOS (iPad, iPhone, iPod) Support

Limited iOS (iPad, iPhone and iPod devices) support is introduced for S-Drive Folders and S-Drive Attachments (Figure 36).
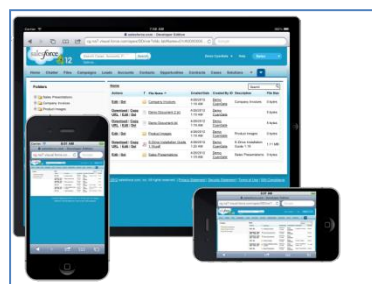

Figure 36

You **can** "browse files/folders", "create folders", "search files/folders", "download files", "email files", "edit fields (e.g. Description)", "delete files/folders", "bulk delete files", "copy URLs of files", "sort files/folder ascending or descending", "attach files from S-Drive Folders (for S-Drive Attachments)" using your iOS device (preferably iPad).

But currently you **cannot** "upload files" using your iOS device. 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 Manager" 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.