S-DRIVE

S-Drive Configuration

for Salesforce.com Communities

v2.0

Important Note

This guide contains information about Salesforce Communities for S-Drive. Refer to the *S-Drive Installation Guide, S-Drive Advanced Configuration Guide and S-Drive User Guide* for more information about installing/ configuring S-Drive product.

CyanGate

Contents

A. Enabling Communities for Your Organization

Click Setup -> App Setup -> Customize -> Communities -> Settings (Figure 1).

App Setup
- **Customize**
  - ▶ Tab Names and Labels
  - ▶ Home
  - ▶ Activities
  - ...
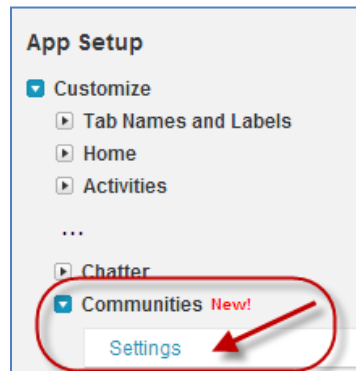 - ▶ Chatter
  - **Communities** *New!*
    - Settings

Figure 1

In the "Communities" page, first check "Enable Communities" checkbox. Then type a unique domain name that will be used in all your communities. Note that this name can't be changed after you save it. Click "Check Availability" button and if "Success" message is shown click "Save" button (Figure 2).
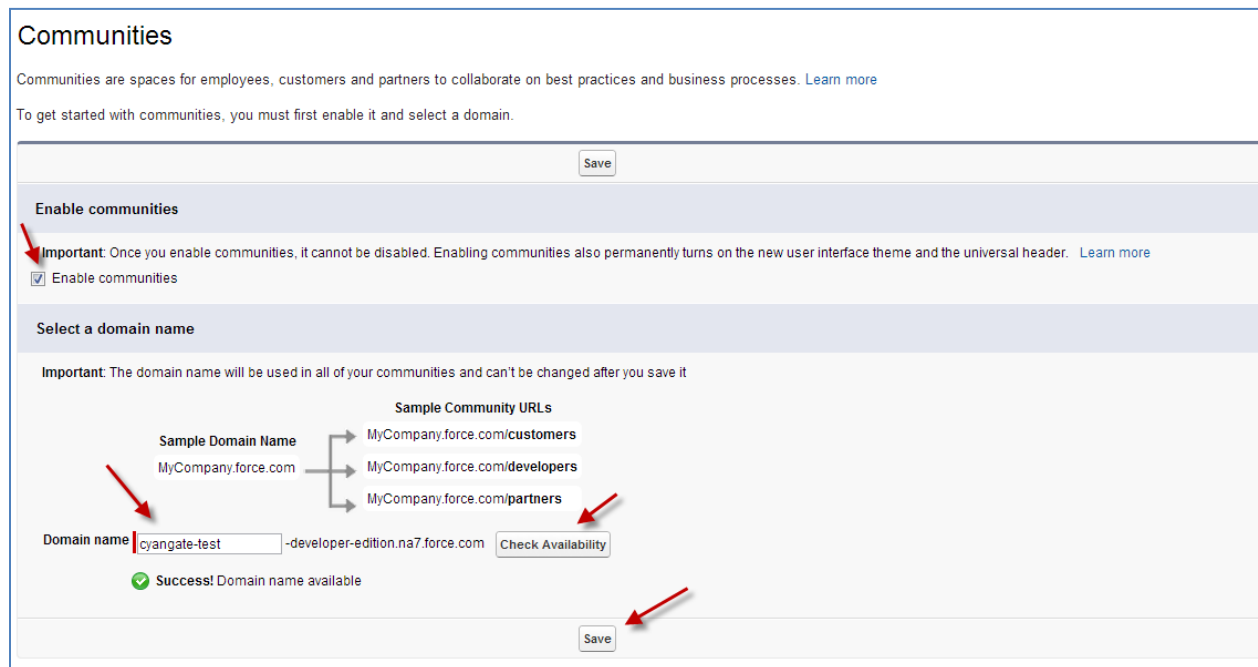

Communities

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. Learn more

To get started with communities, you must first enable it and select a domain.

Save

Enable communities

Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. Learn more
☑ Enable communities

Select a domain name

Important: The domain name will be used in all of your communities and can't be changed after you save it

Sample Community URLs

Sample Domain Name ⟶ MyCompany.force.com/**customers**
MyCompany.force.com ⟶ MyCompany.force.com/**developers**
⟶ MyCompany.force.com/**partners**

Domain name [cyangate-test] -developer-edition.na7.force.com [Check Availability]

✅ **Success!** Domain name available

Save

Figure 2

B. Creating a New Community

Once you enable Communities for your organization, you can create new communities (Figure 3). You can click "New Community" button to create a new community.
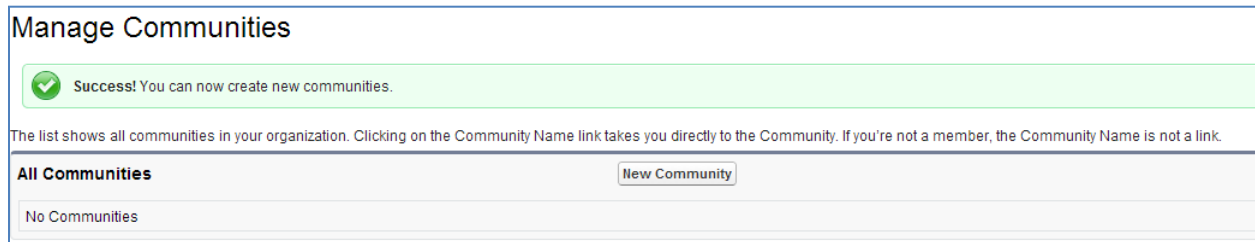
Figure 3

Type in the details of the new community and click "Create" button (Figure 4).

Figure 4

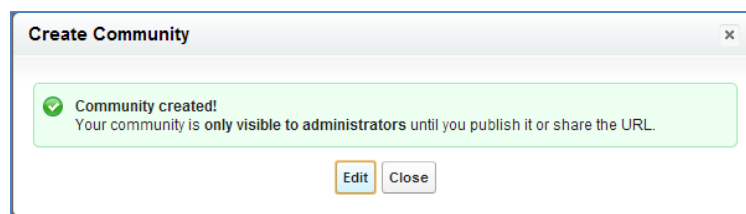Once you click the "Create" button community will be created in a few seconds (Figure **5**).

Figure 5

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C. Configuring S-Drive for Community

After creating the community click the "Edit" button to configure the newly created community (Figure 6).
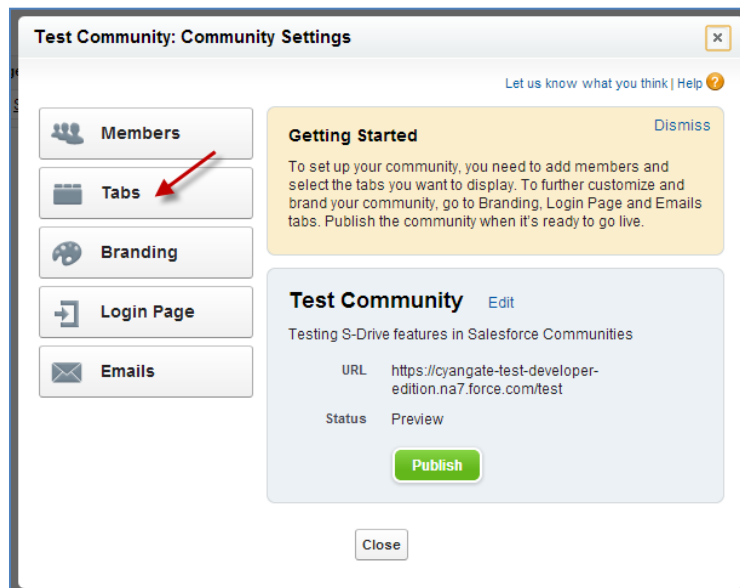

Figure 6

Click "Tabs" section and select the "S-Drive" tab to display in the Community pages. You can also select S-Drive Attachments containing standard/custom object tabs and click "Save" button (Figure 7).
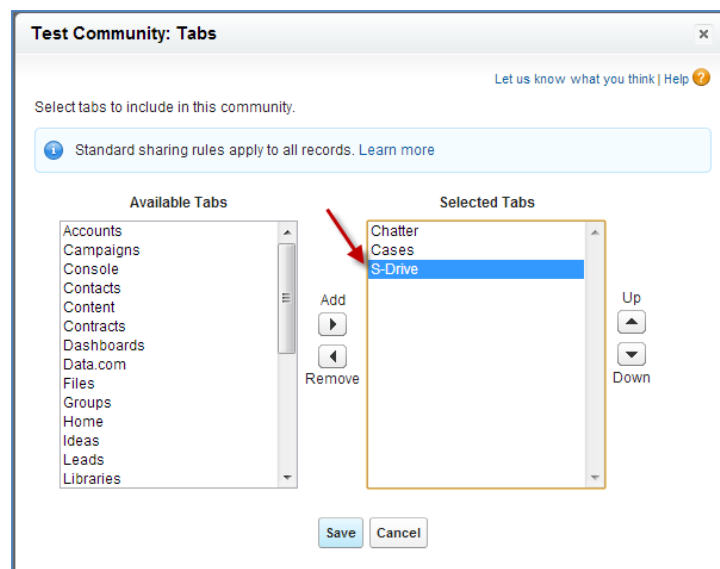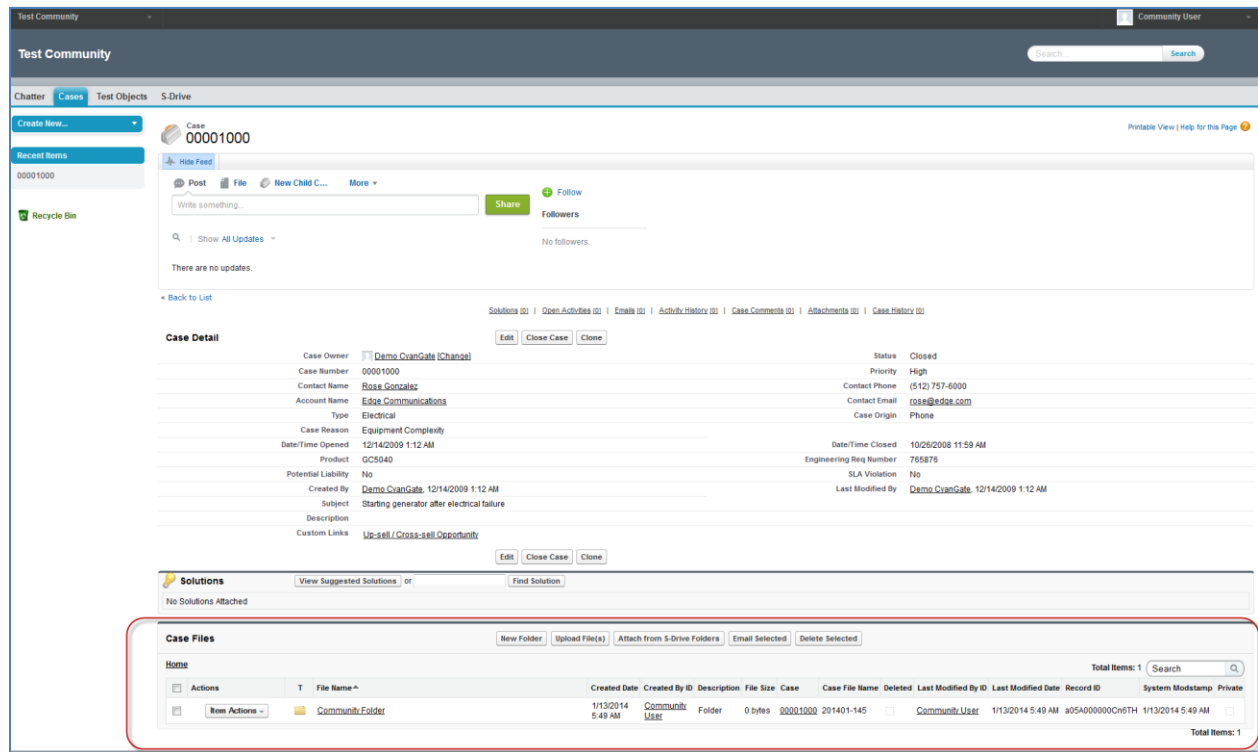

Figure 7

Below is a sample Community screen with Case Files enabled:

Figure 8

D. Configuring S-Drive Lightning Component for Lightning Communities

Salesforce offers a Community Builder comes with rich, responsive templates (E.g Napili) for communities targeted at customer support scenarios. You can follow the steps below configure S-Drive Lightning Component for Lightning based communities.

1- Navigate to Setup→ All Communities → Manage. See Figure 9

Figure 9

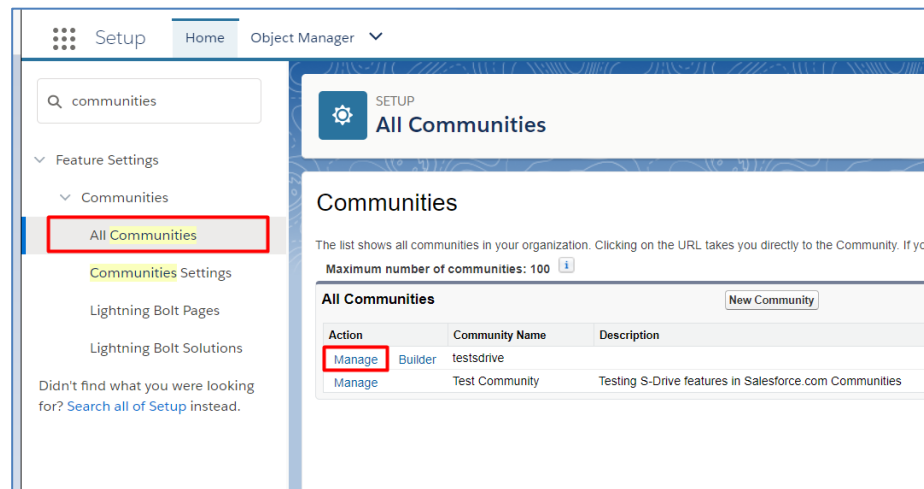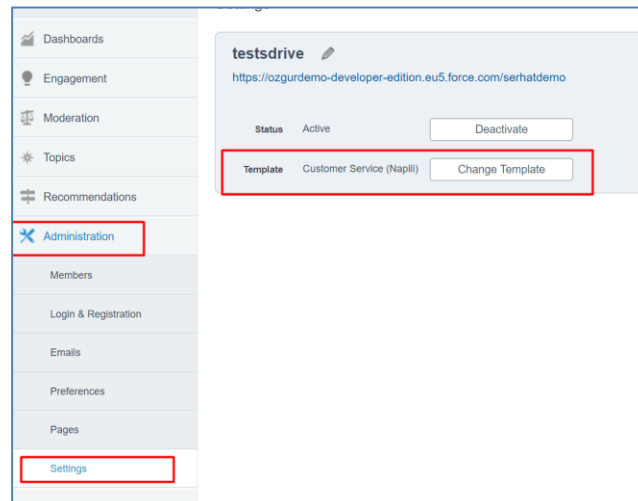2- You can select your lightning compatible template from Administration→ Settings. See Figure 10.

Figure 10

3- Navigate to Setup→All Communities→Builder. See Figure 11.
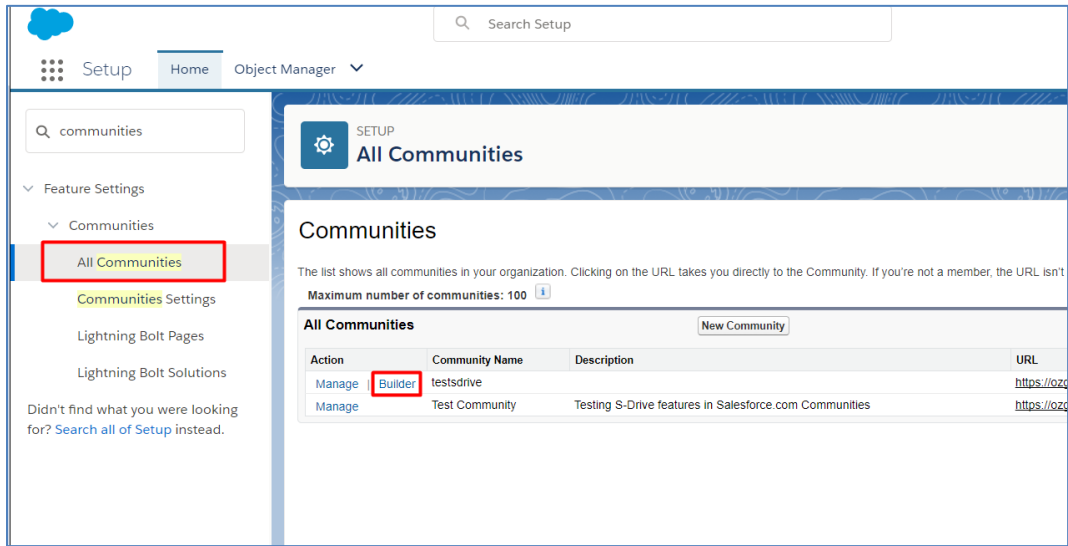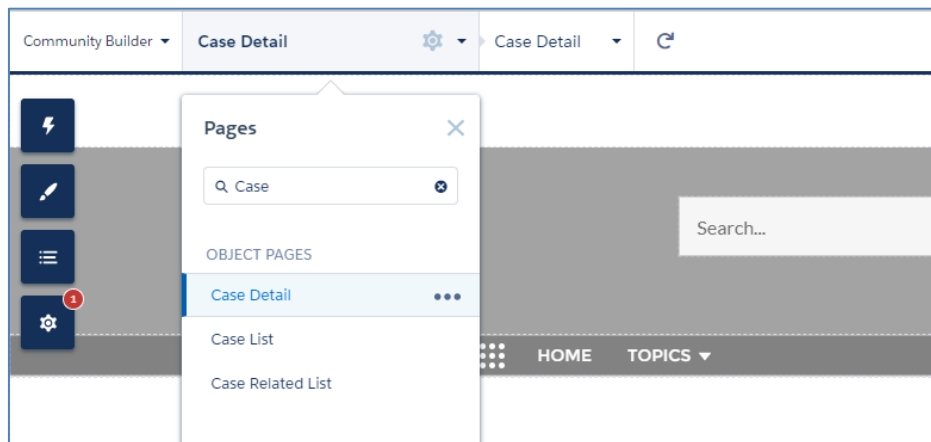
4- Select a page to add S-Drive component. See Figure 12.

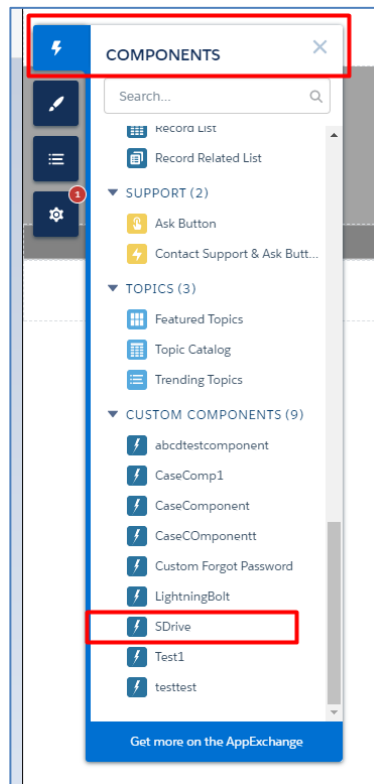5- Open Components menu, scroll down and locate S-Drive Lightning Component. See Figure 13
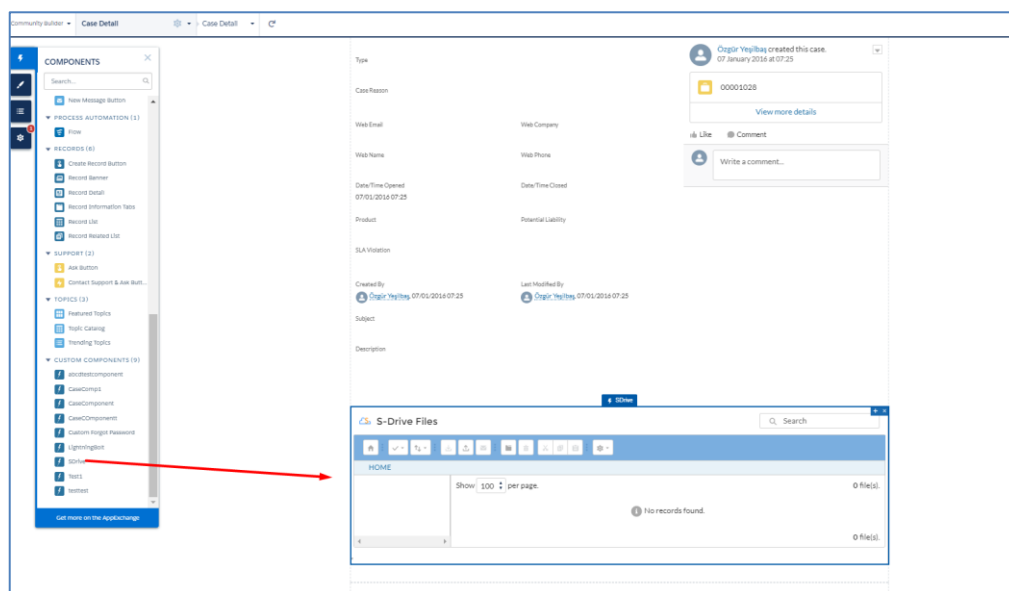
6- Drag & Drop S-Drive Lightning Component to your page.

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7- Click on the component in the page and then start filling component attributes. See Figure 15.

Title		Default email address	
Case Files			
Parent object name		✔ Enable upload	
Case		Allowed file extensions	
Object namespace prefix			
		✔ Enable folders	
File object name		✔ Enable private files	
CaseFile__c		Default sort field name	
File object namespace prefix		cg__File_Name__c	
cg__		Default sort order	
Relationship field name		asc	
Case__r		File number to be shown in a page	
✔ Enable copy url		100	
✔ Enable delete		Default view type of file list table	
✔ Enable download		list	
✔ Enable edit		✔ Show Folder Tree component	
✔ Enable e-mail		✔ Show breadcrumb component	

Figure 15

The component attributes are explained below;

a) **Title (optional)**
   This is the title of the page block inside the object page. You can set it to "My Example Object Files". This field is optional and if you don't provide a value for this field, it will be set as "S-Drive Files".

b) Parent object name

This is the name of the custom or standard object that will be the object that the files will be attached to.

For Case Files: Parent Object name = Case.

For Account Files: Parent object name = Account.

For Contact Files: Parent Object name = Contact.

For Opportunity Files: Parent object name = Opportunity.

Fot Other Standard Object Files: Parent object name = Name of your standard object (E.g. Lead)

For Custom Object Files: Parent object name = API Name of your custom object (E.g. My_Example_Object__c)

If you are adding S-Drive Tab (S3Object) to the communities, Parent object name will be empty.

c) Object namespace prefix (optional)

This is the object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you have a custom object inside your organization, your object namespace prefix is same with your organization namespace prefix. If this object belongs to a managed package, you need to use that managed package's namespace prefix. If your object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to manually set objectNamespacePrefix as "exampleprefix__".

For Case, Account, Opportunity, Contact and other standard objects this attribute will be empty. For Custom Objects, this attribute will be set as your organization prefix.

d) File object name

This is the name of your object file. This object will be holding the information regarding the attached files. For our example, it is "My_Example_Object_File__c" or "CaseFile__c".

For Case: File object name = CaseFile__c.

For Account: File object name = AccountFile__c.

For Contact: File object name = ContactFile__c.

For Opportunity: File object name = OpportunityFile__c.

For Custom Object: File object name is your custom object file API Name (E.g. My_Example_Object_File__c).

If you are adding S-Drive tab (S3Object) to the communities, file object name will be "S3Object__c"

e) **File object namespace prefix (optional)**
This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you have a custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. If your file object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set File object namespace prefix as "exampleprefix__".

For Case Files, Account Files, Opportunity Files, Contact Files and S3Object (S-Drive Tab) this attribute will be set as "cg__"
For Custom Object Files, this attribute will be the name of your organization prefix.

f) **Relationship field name**
Master-detail relation used for selected standard/custom object. This attribute is optional and default value is 'Parent__r'.

g) **Enable copy URL (optional)**
This option is used to enable/disable "Copy URL" link in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Copy URL" link for each asset. The default value for this checkbox is checked.

h) **Enable delete (optional)**
This option is used to enable/disable "Delete" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Delete" link for each asset. The default value for this checkbox is checked.

i) **Enable download (optional)**
This option is used to enable/disable "Download", "Open" and "Zip & Download" options for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Download" link for each asset. The default value for this checkbox is checked.

j) **Enable edit (optional)**
This option is used to enable/disable "Edit" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Edit" link for each asset. The default value for this checkbox is checked.

k) Enable e-mail (optional)

This option is used to enable/disable "E-Mail" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "E-Mail" link for each asset. The default value for this checkbox is checked.

l) Default email address (optional)

You can use this option, if you want to set a default "Additional To" email address for sending emails from your S-Drive Attachments. For example, if you select an Account S-Drive Attachment for an account and click "Email" button, "Email Files" screen will be opened and "Additional To" field will be filled with the email address you have provided here.

m) Enable upload (optional)

This option is used to enable/disable "Upload" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Upload File(s)" link for each asset. The default value for this checkbox is checked.

n) Allowed file extensions (optional)

You can use this option, if you want to limit the file types to be uploaded into selected object's S-Drive attachments. Semicolon separated list of file extensions that are allowed to upload can be written here. This attribute is optional and leaving this empty will allow all kind of files to be uploaded. For example, "*.jpg, *.txt" will limit the files to be uploaded to jpg and txt files.

o) Enable folders (optional)

This option is used to enable/disable folder support for S-Drive attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "New Folder" button. The default value for this checkbox is checked. If the box is not checked, the "New Folder" button will be removed from the toolbar section.

p) Enable private files (optional)

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users' access to individual files. Set this attribute to true by checking the checkbox, if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. The default value for this checkbox is unchecked.

q) Default sort field name (optional)

This option is used to order/sort S-Drive attachments based on a field. You need to set the name of the field that should be used to order the list of files. For this example, it should be filled in as

"cg__File_Name__c". You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

r) **Default sort order (optional)**

This option is used to set the sort order direction of the S-Drive attachments. There are two possible values for this attribute: "asc" or "desc". The default value is "asc" which stands for ascending. You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

s) **File number to be shown in a page (optional)**

This option is to set the number of files to be shown in an attachment page. The default value for this section is set to 100. If this value is set to '30' and object has 91 total items, the files will be displayed in 4 pages. You can change this option from the pagination setting located under the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

t) **Default view type of file list table (optional)**

This option is to set the default view type of the file list table. There are 3 options you can choose: List, Thumbnail and Grid. You can change this option from the toolbar of S-Drive attachments, and set it as default by using the settings button. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

u) **Show Folder Tree component (optional)**

This option sets the default behavior of the folder tree component located on the left-hand side of the S-Drive attachments page. You can choose to hide or show the Folder Tree component by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

v) **Show breadcrumb component (optional)**

This option sets the default behavior of the breadcrumbs located on the left-hand side of the S-Drive attachments page, above the folder tree component. You can choose to hide or show the breadcrumbs by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments*

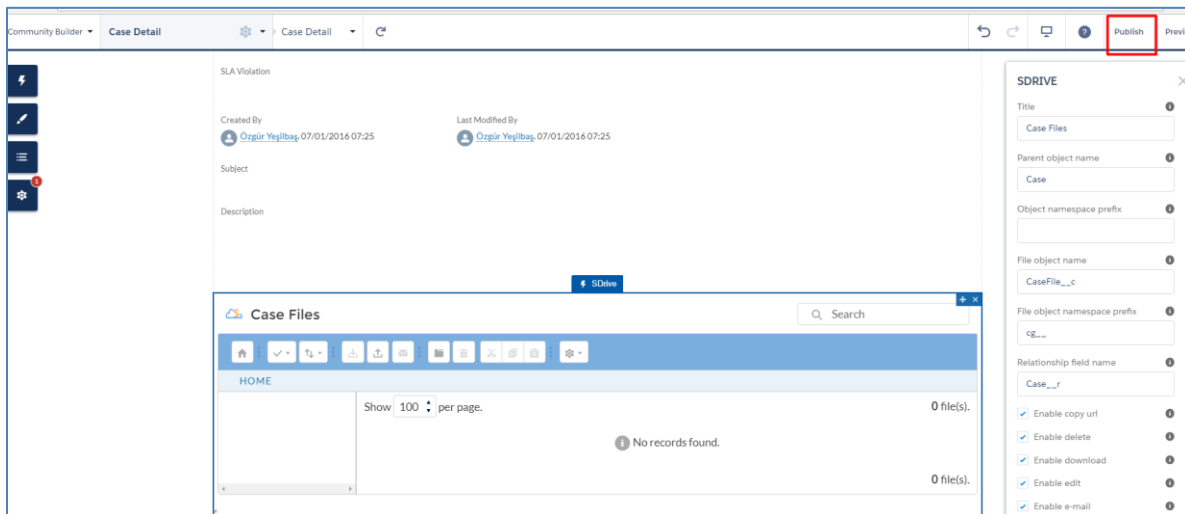8- Once configuration is complete, you can publish your changes from top right corner. See Figure 16.

Figure 16

E. Security Settings

To enable profiles for selected community, use the "Members" section in the "Community Settings" page (Figure 6).

Based on the profile of the community user, users can have different permissions in S-Drive.

If you try to access the community with no permissions, you'll see "You do not have permissions to access S-Drive data!" error when you click the "S-Drive" tab (Figure 17).
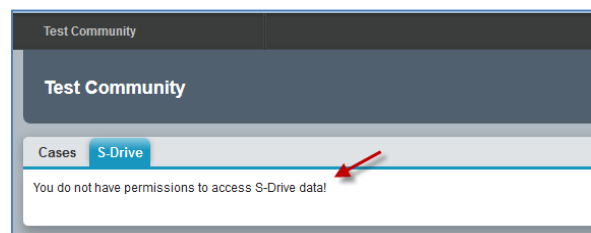
Figure 17

If you just enable "read" feature, community users will just be able to download or email uploaded files by internal users. They won't be able to upload a file, delete a file, create a folder or edit an item's description. Also note that visibility of the files list, buttons and menu items are affected via sharing and S-Drive Configuration.

To set these permissions edit the selected profile using the Administration Setup -> Manage Users -> Profiles menu. Click on the name of the profile you want to edit (Figure 18).
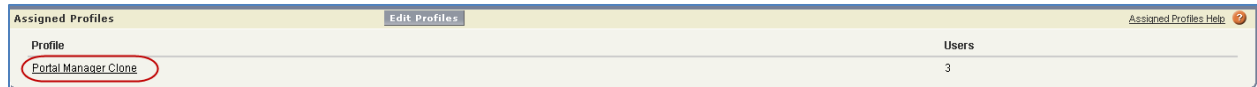
Figure 18

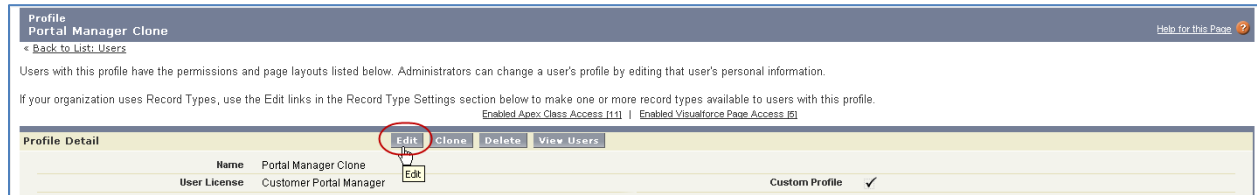In the new window click Edit button to edit the user permissions (Figure 19).

Figure 19

Scroll down to the "**Custom Object Permissions**" section. You'll see the "**Basic Access**" selections for "**S3Objects**" custom object (or if you're working on S-Drive Attachments like Cases, Accounts, custom objects etc. you need to edit the custom object file's permissions). You will need to check/uncheck these boxes based on your needs (Figure 20). Note that you can edit "Custom Object Permissions" for just "Custom Profiles". You may need to *clone* your standard profile to be able to edit a community profile. Refer to the Salesforce.com documentation for more information.

There are four access levels: **Read, Create, Edit, and Delete**. We'll see examples of these access level combinations in the subsections.

Figure 20

You can set access levels for customers using communities*. We strongly suggest you to just set the "Read" access to the community users for data security.*

F.   Example 1: Just Read Permission Enabled
If you just set "Read" and unset other permissions for selected custom object (here S3Object) (Figure 20), your community users won't be able to:

-   upload files
-   create folders
-   delete files/folders
-   edit descriptions of files/folders
-   cut/copy files

- rename files/folders.

They will be able to:

- browse folders
- download files
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "Email" and "Download File(s)" buttons will be displayed (if Download Manager is enabled) for community users and for each file "Download" and "Copy URL" item menu actions will be visible. "Item Actions" menu will be hidden for folders (Figure 21).
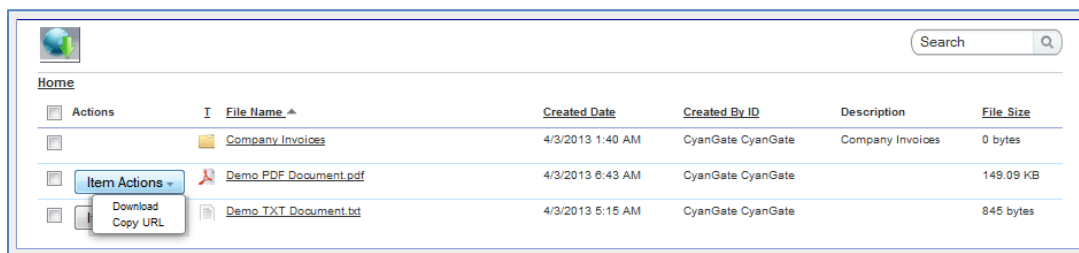
Figure 21

G. Example 2: Read, Create and Edit Permissions Enabled

If you set Read, Create, Edit permissions and unset Delete permission for selected custom object (here S3Object) (Figure 22), your community users won't be able to:

- delete files/folders
- cut/copy files.

Figure 22

They will be able to:

- upload files
- create folders
- browse folders
- download files
- rename files/folders
- edit descriptions of files/folders
- email files

-   copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email" and "Download File(s)" (if Download Manager is enabled) buttons will be displayed for community users and for each file "Download", "Edit", "Rename" and "Copy URL" action menu items will be visible. "Edit" and "Rename" action menu items will be visible for folders (Figure 23). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.
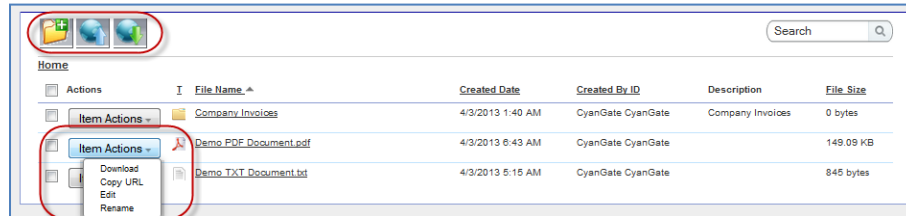

Figure 23

H. Example 3: Read, Create, Edit and Delete Permissions Enabled

If you set Read, Create, Edit, Delete permissions for selected custom object (here S3Object) (Figure 24), your community users will be able to:

Figure 24

-   upload files
-   create folders
-   browse folders
-   download files
-   delete files/folders
-   edit descriptions of files/folders
-   cut/copy files
-   rename files/folders
-   email files
-   copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email", "Download File(s)" (if Download Manager is enabled), "Cut", "Copy", "Paste" and "Delete File(s)" buttons will be displayed for community users and for each file "Download", "Edit", "Copy URL", "Rename" and "Delete" item menu actions will be

visible. "Edit", "Rename" and "Delete" action menu items will be visible for folders (Figure 25). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.
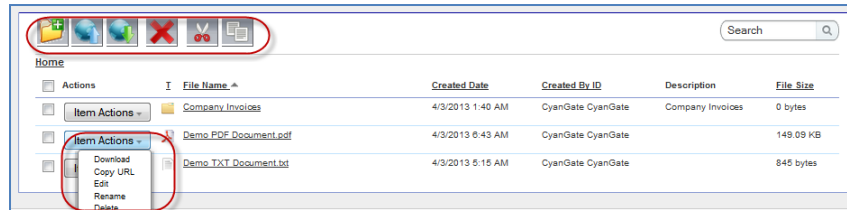

Figure 25

I. Permission Combinations That Are Not Supported

Permission combinations other than above examples are not supported by S-Drive and we strongly recommend you not to use unsupported permission combinations.

J. Other Issues

If you get an "INVALID FIELD" error message like below while uploading a file after giving required permissions, you may need to check the "Field Accessibility" settings for the selected profile under Administration Setup -> Security Controls -> Field Accessibility menu:
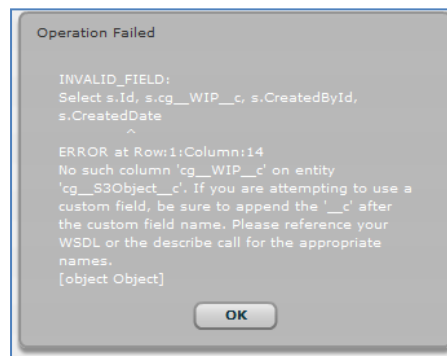

Figure 26

"Hidden" fields for the selected custom object (here S3Object) needs to be set as "Visible" from this menu.

F. 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