S-Drive Lightning User Guide v2.0

CyanGate

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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:
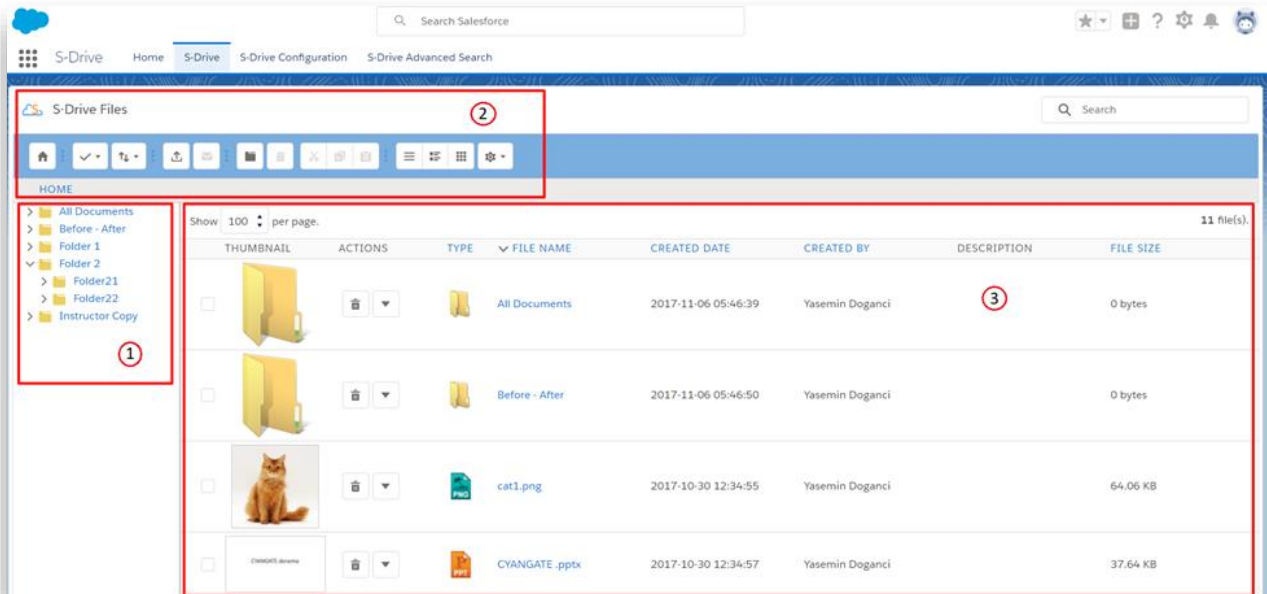
1. S-Drive Folders

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 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 show its contents on the panel when clicked.

2. Toolbar

Top panel (Figure 1-2) is the **"Toolbar"** panel. It displays breadcrumb navigation for folders, search box, action buttons and view type buttons.

Important Note: "Attach from S-Drive Folders" button is not supported at the moment for S-Drive for Salesforce Lightning Experience. It will be supported with the upcoming patch releases. See "S-Drive User Guide" for more information about attaching files in Classic version of Salesforce.
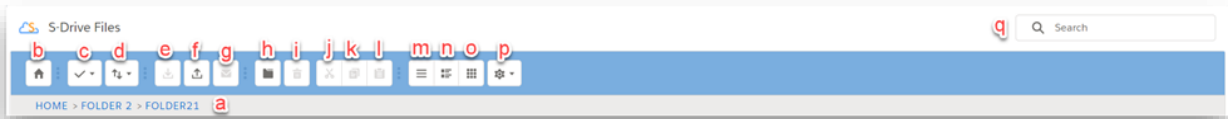
Figure 2

(a) **"Breadcrumb Folder Navigation"** 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 2-a). You can click any level to drill down to that subfolder.

(b) **"Home"** button is functioning same as "Home" link on breadcrumb navigation. It directs to root folder of S-Drive Folders.

(c) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(d) **"Sort -Dropdown"** button is used to sort File List below. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(e) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder selected, it creates a zip file and download it.

(f) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 2-f). This item is not displayed for the "Search Results View".

(g) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 2-g).

(h) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 2-h). This item is not displayed for the "Search Results View".

(i) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 2-i).

(j) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 2-j).

(k) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 2-k).

(l) **"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 2-l). This item is not displayed for the "Search Results View".

(m) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(n) ⊞ It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(o) ⊞ It changes current view to **Grid** view. For more information, you can look at **View Types** section.
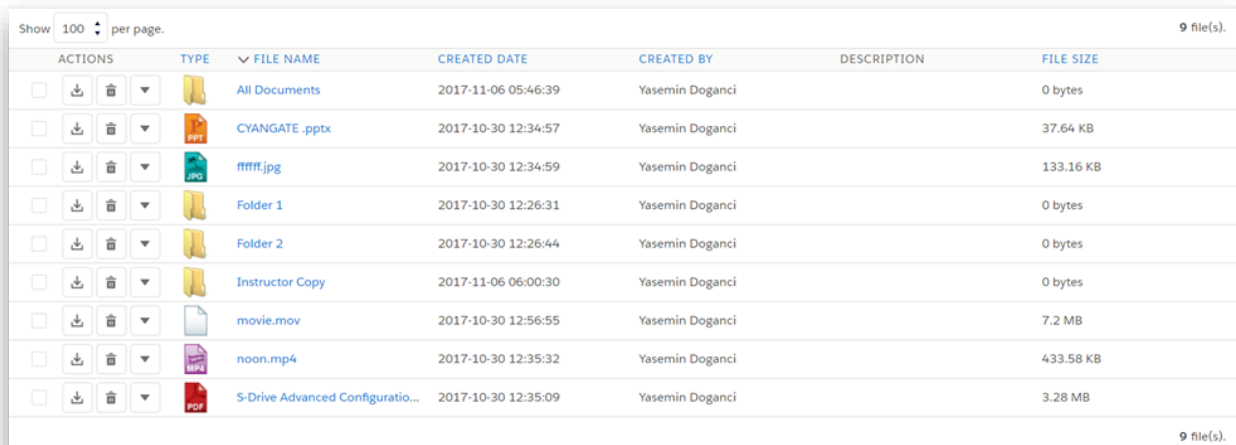
(p) ⚙▾ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

    a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

    b. **"Save Sort Field as Default"**: If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

    c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 3-a) will not be shown in the panel.

    d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 1-1 will not be shown.

(q) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 2-q).

B. View Types

A. List View

List view is default S-Drive view for all users. There is no any thumbnail or preview image for this view type. The files are listed in a regular order in this view type (Figure 3).

ACTIONS	TYPE	∨ FILE NAME	CREATED DATE	CREATED BY	DESCRIPTION	FILE SIZE
☐ 📥 🗑 ▼	📁	All Documents	2017-11-06 05:46:39	Yasemin Doganci		0 bytes
☐ 📥 🗑 ▼	PPT	CYANGATE .pptx	2017-10-30 12:34:57	Yasemin Doganci		37.64 KB
☐ 📥 🗑 ▼	JPG	ffffff.jpg	2017-10-30 12:34:59	Yasemin Doganci		133.16 KB
☐ 📥 🗑 ▼	📁	Folder 1	2017-10-30 12:26:31	Yasemin Doganci		0 bytes
☐ 📥 🗑 ▼	📁	Folder 2	2017-10-30 12:26:44	Yasemin Doganci		0 bytes
☐ 📥 🗑 ▼	📁	Instructor Copy	2017-11-06 06:00:30	Yasemin Doganci		0 bytes
☐ 📥 🗑 ▼	📄	movie.mov	2017-10-30 12:56:55	Yasemin Doganci		7.2 MB
☐ 📥 🗑 ▼	MP4	noon.mp4	2017-10-30 12:35:32	Yasemin Doganci		433.58 KB
☐ 📥 🗑 ▼	PDF	S-Drive Advanced Configuratio...	2017-10-30 12:35:09	Yasemin Doganci		3.28 MB

Show 100 ↕ per page.   9 file(s).

9 file(s).

Figure 3

(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.

(2) **"Actions"** column is used to display action buttons. Based on the sharing settings, you can see **"Item Actions Menu"** by down arrow button inside the Actions column. There are two quick buttons for constantly used actions: **Download** & **Delete**. Once you click the arrow button, you'll see a dropdown menu under the button. Let's review the details about these item actions.

Figure 4

(a) **Open**: It opens files that browsers support to view. If browser cannot open, it will be downloaded.

(b) **Download**: You can download the selected file by selecting this action menu item. If you start download action for a folder, it creates a zip file then download it. See "Downloading Files" section for more information.

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

(d) **Details:** For a file or folder when you click Details action, A modal window opened with file thumbnail and all information about file or folder. For more information, see Details Window.

(e) **Edit**: This option is displayed for both files and folders. You can edit file/folder description by clicking this action menu item. See "Editing File/Folder Description" 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. See "Deleting Files" and "Deleting Folders" sections for more information.

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

(h) **Upload New Version:** If versioning is enabled version actions are shown on menu. By this action, you can upload versions of a file.

(i) **Previous Versions:** By this action, Versioning List page is opened, and all versions are listed. For more information please see "Uploading New Version of a File" and "Previous Versions of File" sections.

(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 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 3).

(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 3).

(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 3).

(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 3).

(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 3).

B. **Thumbnail View**
On thumbnail view, addition to List View there is thumbnail image of the document. Thumbnail view is active only for users who enabled Preview & Thumbnail feature.

Figure 5

C. Grid View

On Grid view, each item is listed on grid-card style with same height (Figure 7**)**. To select grid view, Preview & Thumbnail feature should be enabled. In the Grid view, action buttons, menu & selection checkbox are different (Figure 8):

Figure 6

1) **Selection Checkbox:** When mouse hovers over thumbnail image, a checkbox is shown on the top-left side. You can select or deselect item by using this checkbox. (Figure 6-1).

2) **Detail Window:** When hovering thumbnail image there is a glass icon on the center. If you click on image Detail Window is opened. To see more information please check Detail Window section. (Figure 6-2).

3) **Download Button:** You can download file or folder by using this button. (Figure 6-3).

4) **Delete Button:** It deletes file or folder. To see more information, you can see Delete section. (Figure 6-4).

5) **Action Menu Button:** You can access all actions about file or folder to click this down arrow button (Figure 6-5). To get detail information on actions menu please check List View \ Actions section.
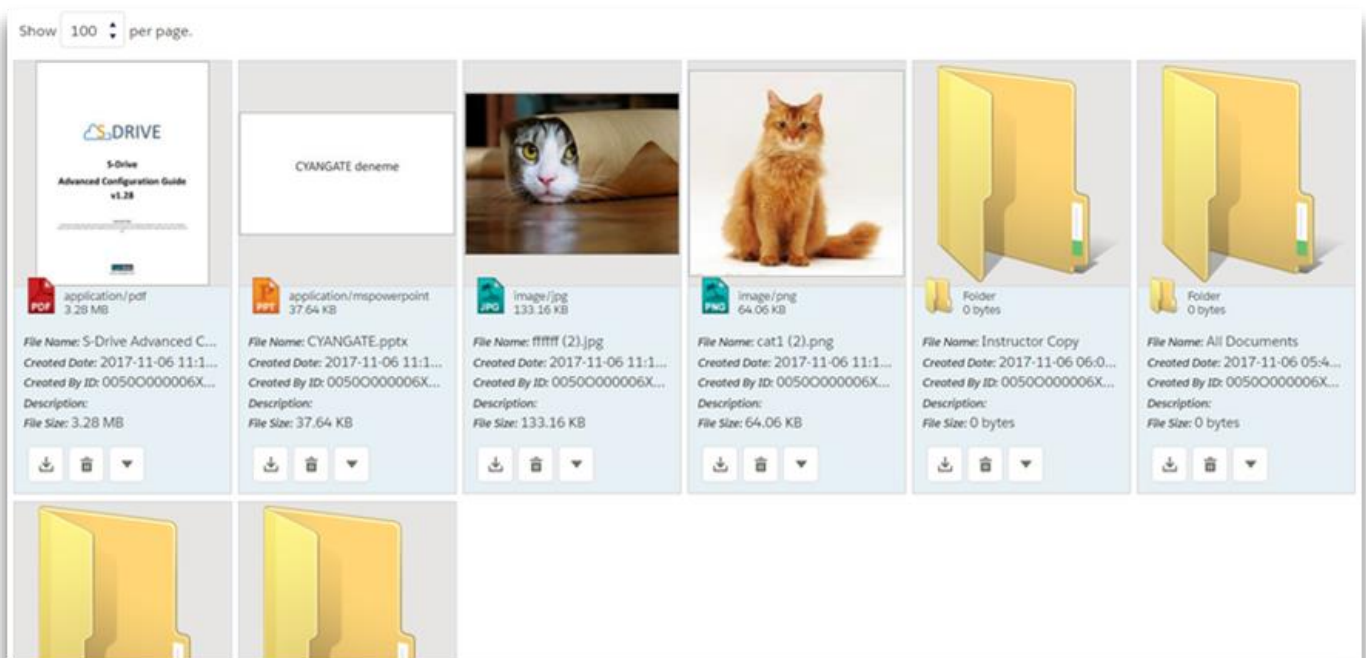
Figure 7
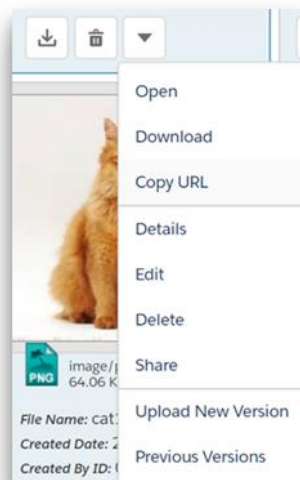
Figure 8

1. **Preview Details Window**

On Thumbnail, Grid and Card views when clicking thumbnail image of file, or on Action Menu clicking "Details" item, Detail View shows up. Detail view consist of three main part: Preview image of file if it exists, File properties & custom fields and Action buttons. To get detailed information on actions menu please check **List View \ Actions** section.
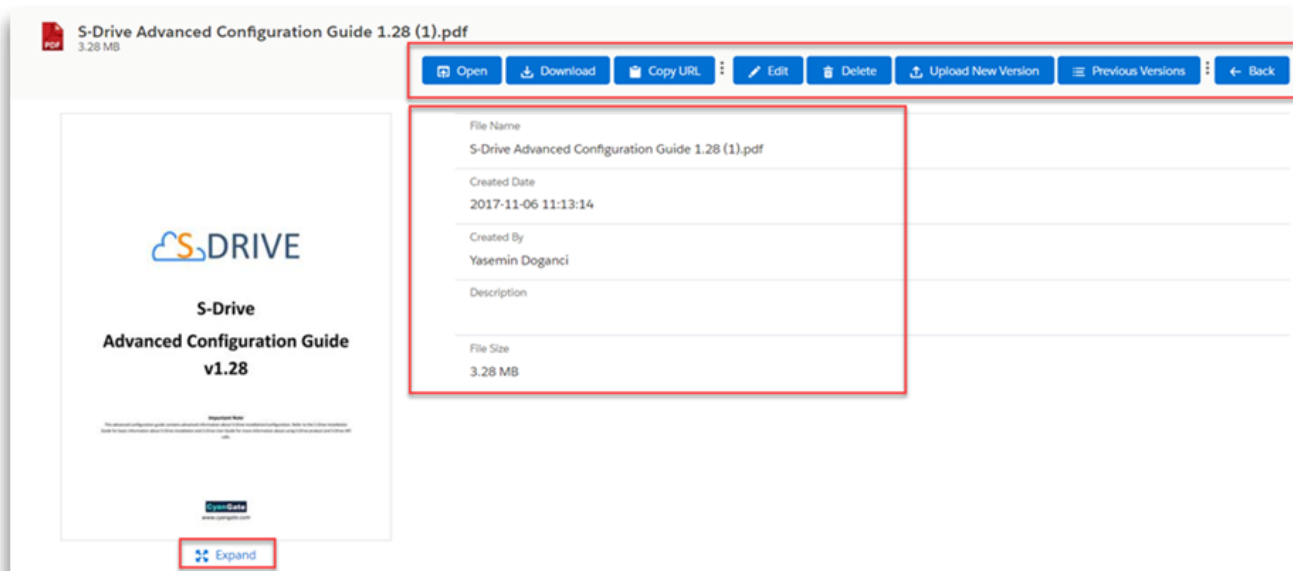
Figure 9

C. Creating Folders

You can create folders by clicking "Create New Folder" button in the toolbar (Figure 2-h). 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 New Folder" button. After clicking the "Create New Folder" button, a new pop-up screen will be opened (Figure 10):

<div align="center">

Figure 10

</div>

(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 10-1).

(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 10-2).

(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 10-3). 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) **"Close Button"**: If you decide not to create a folder, you can click on Close button. Operation will be canceled, and you'll return to the S-Drive Folders screen (Figure 10-4).

(5) "Create Button": After filling in the required fields, you can click on Create button to create the new folder. S-Drive will create the new folder and refresh the folder structure for you (Figure 10-5).

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:

Create Folder
Required fields are missing: [File Name]
✕ Close
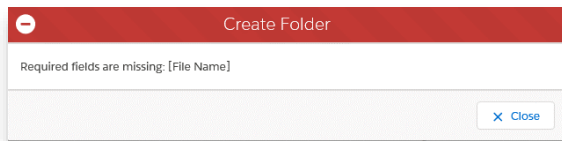
- *'Required fields are missing [File Name]'*.
- *You are attempting to create a folder that has the same name with an existing folder! You may not have access to the existing folder because of sharing rules.'*.

Create Folder
You are attempting to create a folder that has the same name with an existing folder! You may not have access to the existing folder because of the sharing rules.
✕ Close
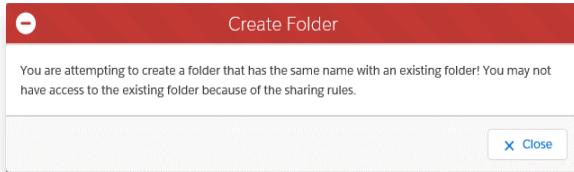
Click OK and then specify a new name to the folder.

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 **"Home"** button and go to the folder where you want to create the subfolder.

D. Uploading Files

You can upload files by clicking "Upload File(s)" button in the toolbar (Figure 2-e). 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, a new pop-up screen will be opened as shown in Figure 11.
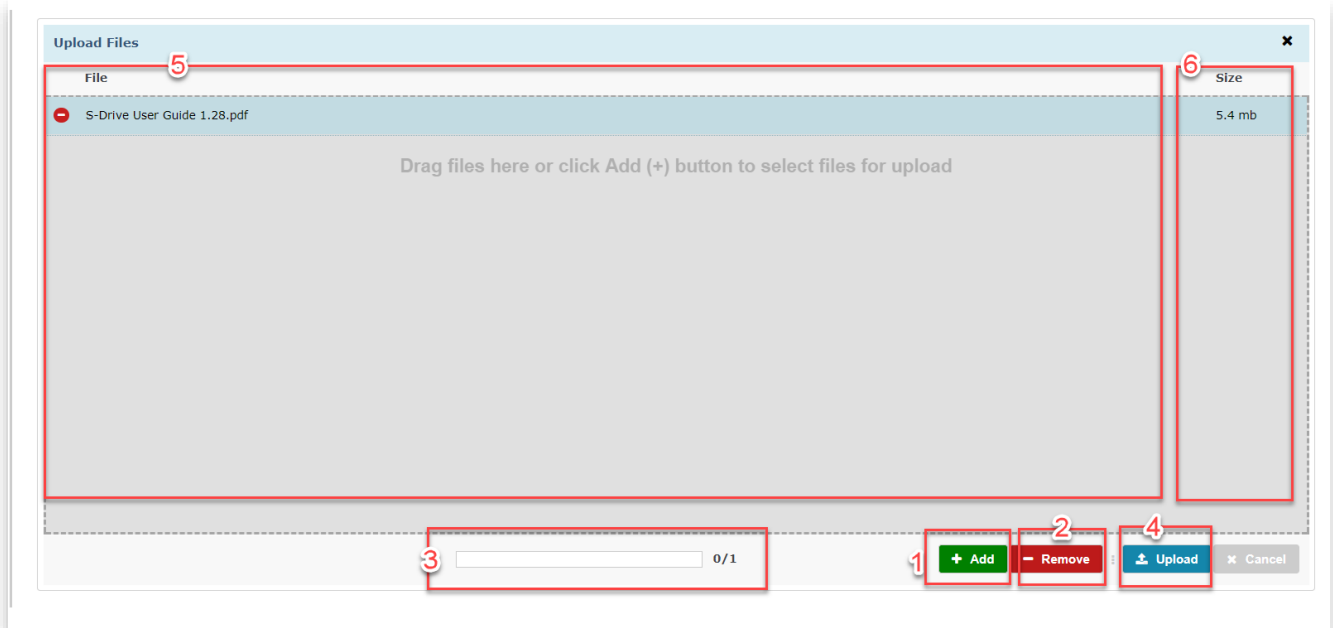
Figure 11

(1) **"+ Add" File(s) Button**: You can add files to the upload list by using this button. After clicking the (+) sign, "Select file(s)" screen will be opened. 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.

(3) **"Upload Progress Bar"**: This progress bar displays the upload information after clicking the "Upload file(s) Button". 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 12

(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.

(5) **"File Column"**: This column displays the names of the files to be uploaded. (Figure 11-5)

(6) **"Size Column"**: This column displays the sizes of the files to be uploaded. (Figure 11-6)

Notes

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

1. **"Status Column"**: This column displays the status of the files which are being uploaded. For HTML Upload, there are five possible scenarios: *Queued*, *Uploading*, *Multipart Processing*, *Done* and *Failed.*

Figure 13

- **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.

For Html Upload, 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.

 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 four possible answers: *Yes, No, Yes to All and No to All* (Figure 14). 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.
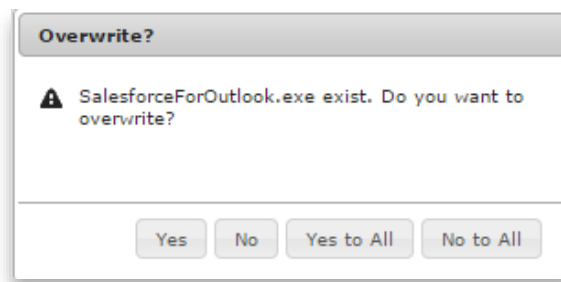
<p style="text-align:center">Figure 14</p>

- 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 15). Click OK and select another file to upload.
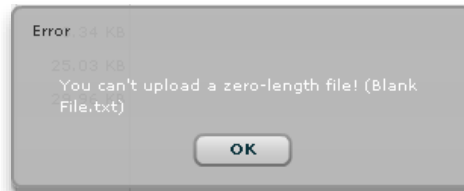
Figure 15

3. After processing the upload list, you'll be informed by saying *"Upload(s) completed successfully"* if list is processed without any errors (Figure 16). After clicking OK button, upload screen will be closed, and the current folder will be refreshed.
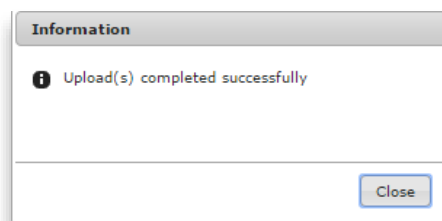
Figure 16

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 "**Home**" button and go to the folder where you want to upload file(s).

E. 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
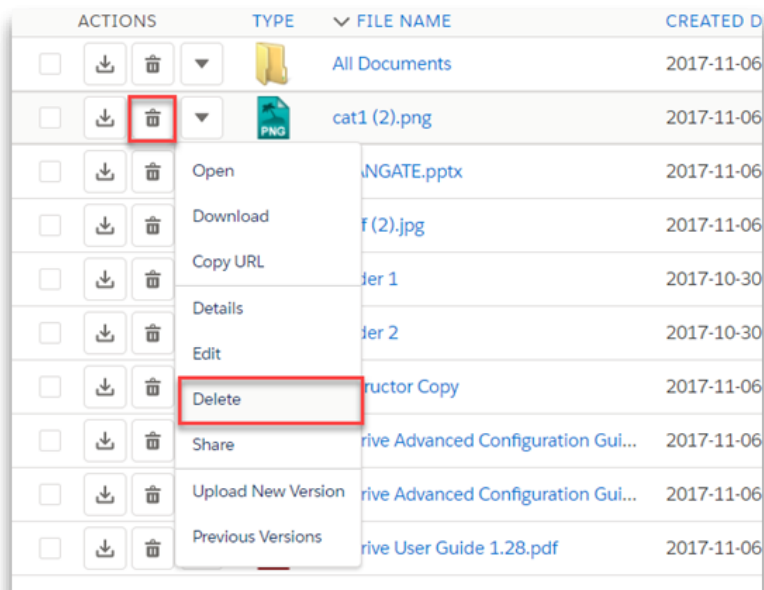
Figure 17

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 17). 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 18).
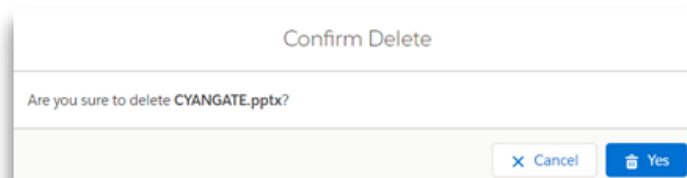
Figure 18

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

 Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

2. Multiple File Deletion
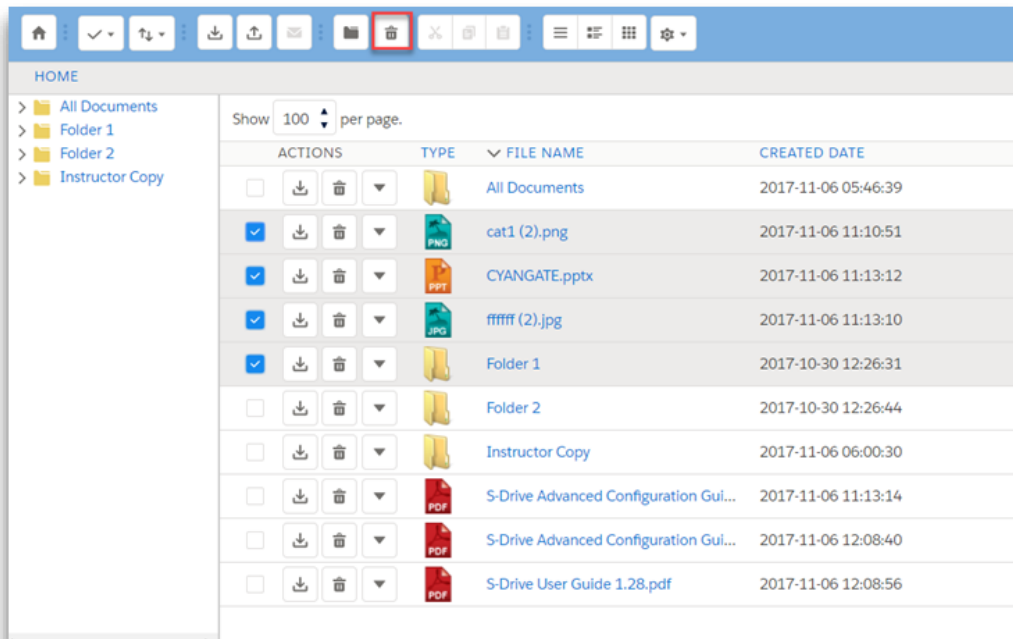
Figure 19

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 19). 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 18). Select "Yes" to delete selected files, "Cancel" to cancel delete operation.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

F. Deleting Folders

You can delete folders using the same approach mentioned in the "Deleting Files" section. However, there are some limitations for the folders. When you try to delete a folder, the delete request should not exceed the maximum CPU time on the Salesforce servers. If you cannot delete the folder because of this issue, you need to select a smaller set of folders, to be able to continue with delete process.

Notes

1. 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 20) 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.

Delete

Error:
You don't have enough permissions to delete this file!

Cancel
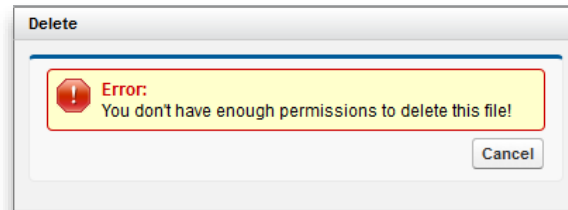
Figure 20

G. 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 21). 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.

HOME

		ACTIONS			TYPE	FILE NAME	CREATED DATE
						All Documents	2017-11-06 05:46:39
✔				▼	PNG	cat1 (2).png	2017-11-06 11:10:51
				▼	PPT	CYANGATE.pptx	2017-11-06 11:13:12

All Documents
Folder 1
Folder 2
Instructor Copy

Show 100 per page.
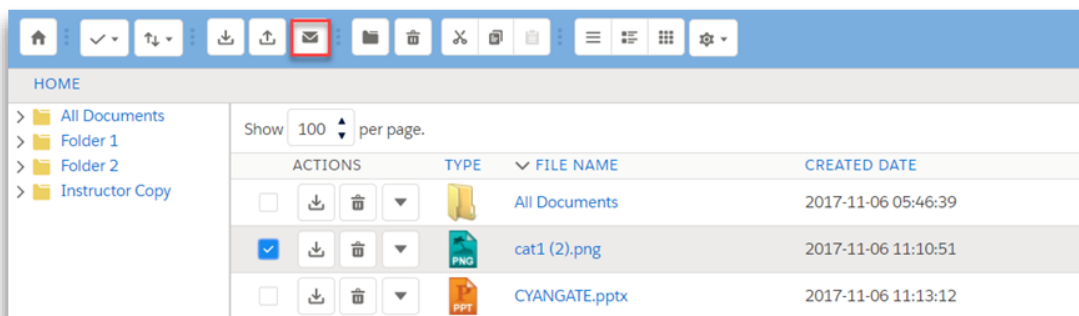
Figure 21

Email Files screen contains many features (Figure 22). Let's review the details of the fields in this screen:
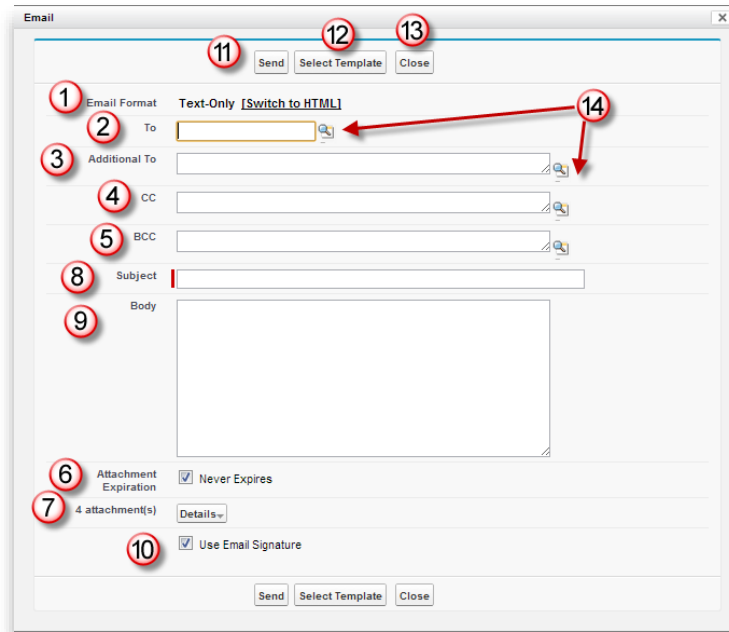
Figure 22

(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 22-1).

(2) **"To...":** The main recipient of the email (Figure 22-2). 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 22-14) 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 23). 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.
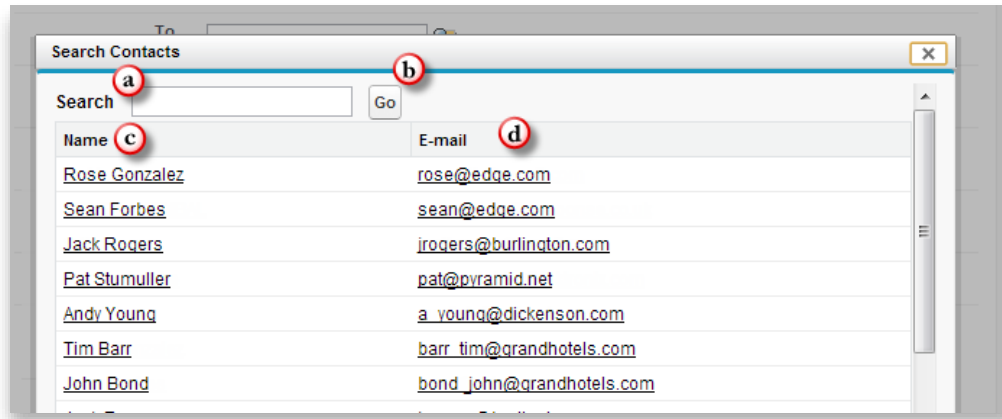
Figure 23

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 23-a).

(b) **"Go Button"**: After typing in the search criteria, click this button to start the search and retrieve the search results (Figure 23-b).

(c) **"Name Column"**: Results will be listed in this section after the search. Results' name will be displayed in this column (Figure 23-c).

(d) **"Email Column"**: Results' emails will be displayed in this column (Figure 23-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 22-14) to select recipients from Salesforce contacts (Figure 22-3). "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 22-14) to select recipients from Salesforce contacts (Figure 22-4). "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 22-14) to select recipients from Salesforce contacts (Figure 22-5). "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 22-6). 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 24). 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.
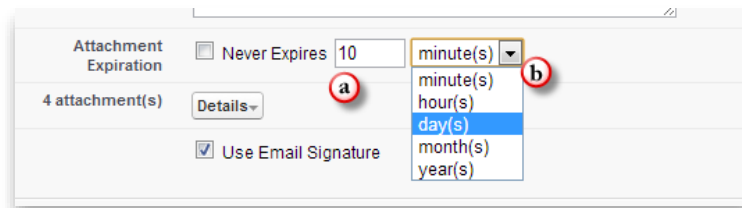
Figure 24

(a) "Number Field": Type in the number for the selected time type (i.e. 30 minutes, 4 hours, 5 months) (Figure 24-a). For this field, only 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 24-b).

(7) "Attachment Details": This section gives information about attached files (Figure 22-7). 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 25).
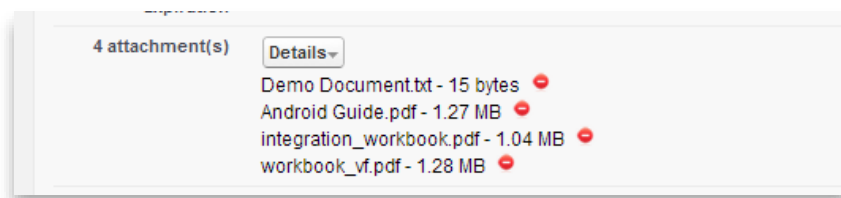
Figure 25

(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 22-8).

(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 22-9).

(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 22-10). "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 22-11). 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 26).

ⓘ Email has been sent successfully

❗ Error:
SendEmail failed. First exception on row 0; first error: INVALID_EMAIL_ADDRESS, Invalid to address : aaaa: []
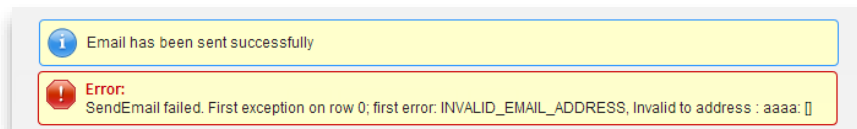
Figure 26

(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 27). 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.
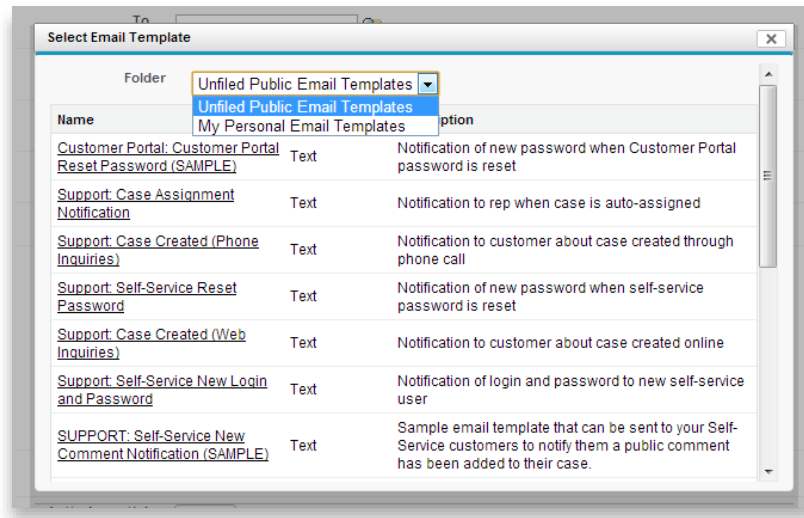
Figure 27

(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 22-13).

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 28).
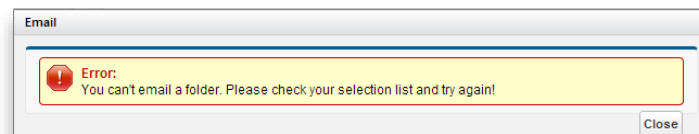
Figure 28

Important Note: "Attach from S-Drive Folders" button is not supported at the moment for S-Drive for Salesforce Lightning Experience. It will be supported with the upcoming patch releases. See "S-Drive User Guide" for more information about attaching files in Classic version of Salesforce.

H. Downloading Files

There are two ways of downloading files in S-Drive: **"One File Download"** and **" Zip & Download (Multiple File & Folder Download)"**.

1. One File Download
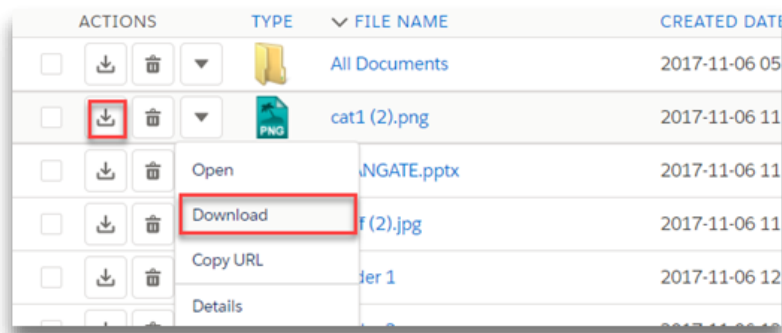
Figure 29

You can download individual files by clicking **"Download"** item menu action and download shortcut button from the "**Item Actions**" button (Figure 29). If "Download" item menu action is selected for file item, download will be controlled by the browser you use (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) If you select "Download" action for a folder it directs to Zip & Download.

2. Zip & Download (Multiple File and Folder Download)

If you choose multiple file and click download button on S-Drive Toolbar, or if you try to download folder by action menu, our service prepares folders and files into a zip file, and start to download zip file automatically (Figure 30).
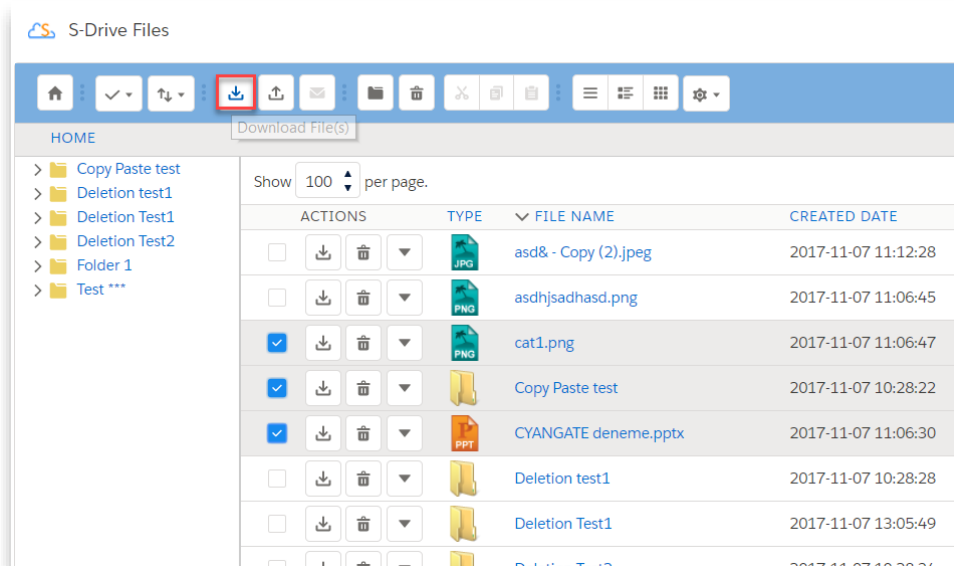
Figure 30

After Zip file prepared, download starts. Zip file is handled by browser, for some browsers download may start immediately, some browsers may ask to download file or not (Figure 31). Zip file can be found under browser's defined download folder. Zip file is named as **[YEAR][MONTH][DAY][HOUR][MINUTE][SECOND]_[OBJECT NAME].zip** .

What do you want to do with 20171116073855_Sdrive_Files.zip (128 bytes)?
From: zip.cyangate.com

Open   Save   ∧   Cancel   ✕
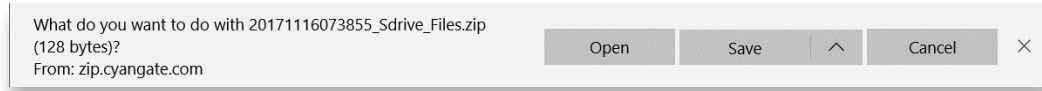
Figure 31

I. Opening Files

If you want to open the files automatically, you should click "Open" link (Figure 32).

ACTIONS	TYPE	∨ FILE NAME	CREATED DATE
⬇ 🗑 ▼	📁	All Documents	2017-11-06 05:46
⬇ 🗑 ▼	PNG	cat1 (2).png	2017-11-06 11:10
⬇ 🗑	Open	NGATE.pptx	2017-11-06 11:13
⬇ 🗑	Download	f (2).jpg	2017-11-06 11:13
⬇ 🗑	Copy URL	der 1	2017-11-06 12:24
⬇ 🗑	Details	der 2	2017-11-06 12:24

Figure 32

Notes
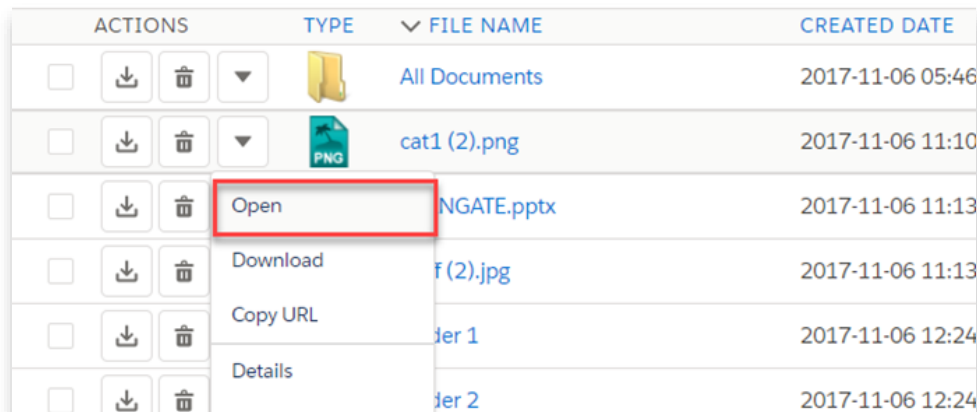
1. You should make some configurations for browsers (Internet Explorer, Firefox, Chrome, Safari, Opera etc.) to enable some types of files for opening. You can reference below links:

    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

J. 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 33).
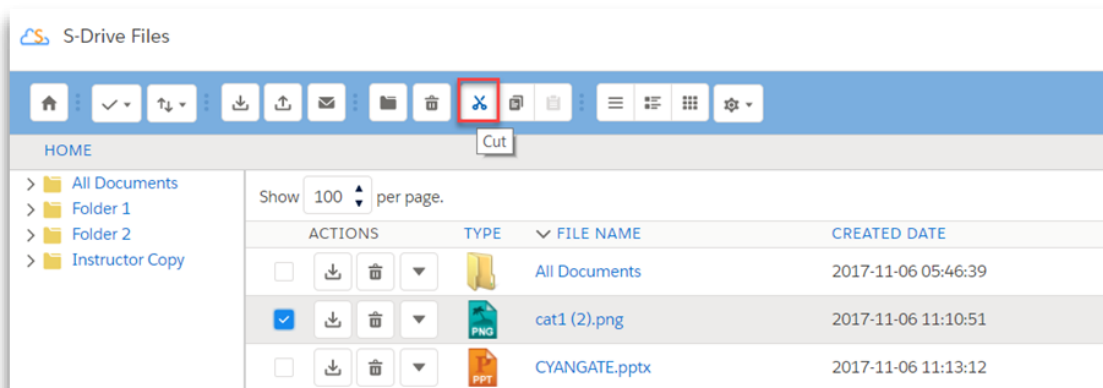
If sharing is enabled, it will ask if you want to bring the current sharings with the cut item(s). You can select "Yes" or "No" based on your decision (Figure 34).
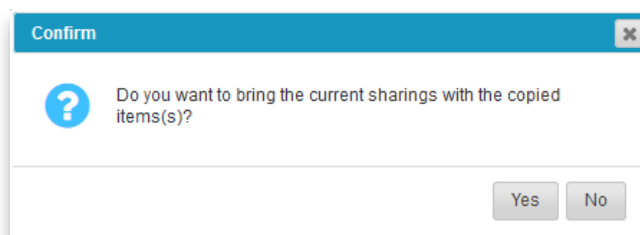
It will start the paste operation and a progress bar will be displayed in the middle of the screen (Figure 35). You can cancel the paste operation anytime by clicking "Cancel" button. After completion of the paste operation this pop-up screen will disappear.
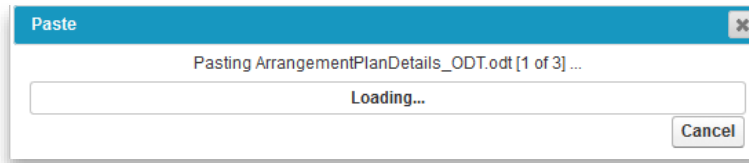
Figure 35

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 36).
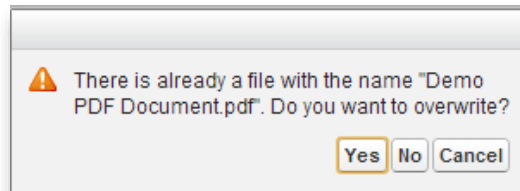
Figure 36

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

1. "**Cut**" and **"Paste"** buttons become invisible if you do not have permissions to cut/paste items in the current folder.
2. *File will be "***Cut***" and ***"Paste"*** with all its versions, if you have versions under this file.*

K. 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 37).
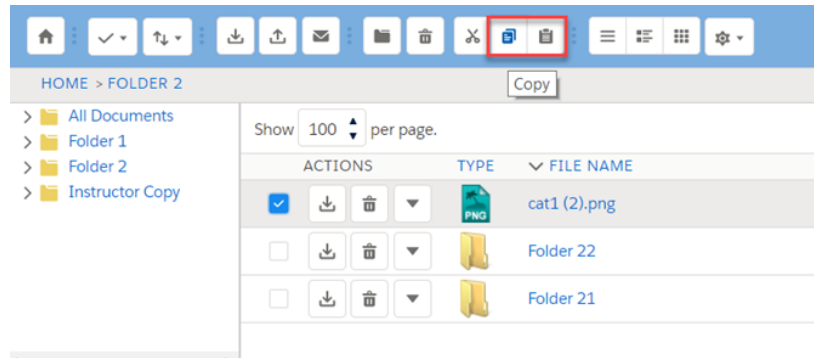
Figure 37

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 38).
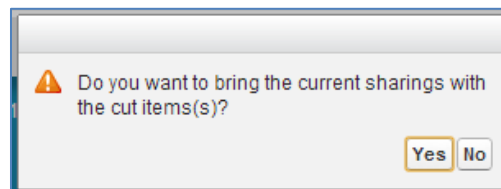
Figure 38

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 39).
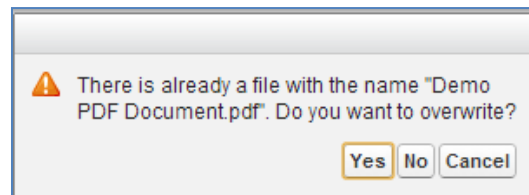
Figure 39

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.
2. If you have versions of your file, only latest version of the will be copied.

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 40).

☐	⬇	🗑	▼	PPT	CYANGATE.pptx	2017-11-06 11:13:12	Ya
☐	⬇	🗑	Open	f (2).jpg	2017-11-06 11:13:10	Ya
☐	⬇	🗑	Download	ler 1	2017-11-06 12:24:19	Ya
☐	⬇	🗑	Copy URL	ler 2	2017-11-06 12:24:24	Ya
☐	⬇	🗑	Details	ructor Copy	2017-11-06 06:00:30	Ya
☐	⬇	🗑	Edit	rive Advanced Configuration Gui...	2017-11-06 11:13:14	Ya
			Delete			
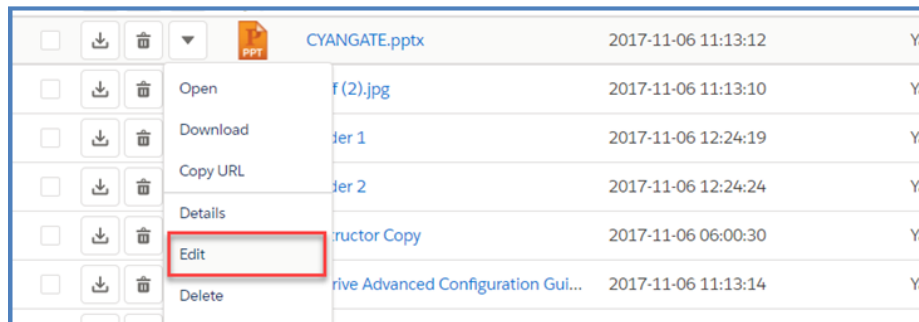
Figure 40

The Detail page of that file/folder will be opened. You can change the name and description here and click "Save" button to save changes. If you click on "Back" button, the changes will not be saved, and you will be directed to S-Drive Folders screen.

Figure 41

Notes
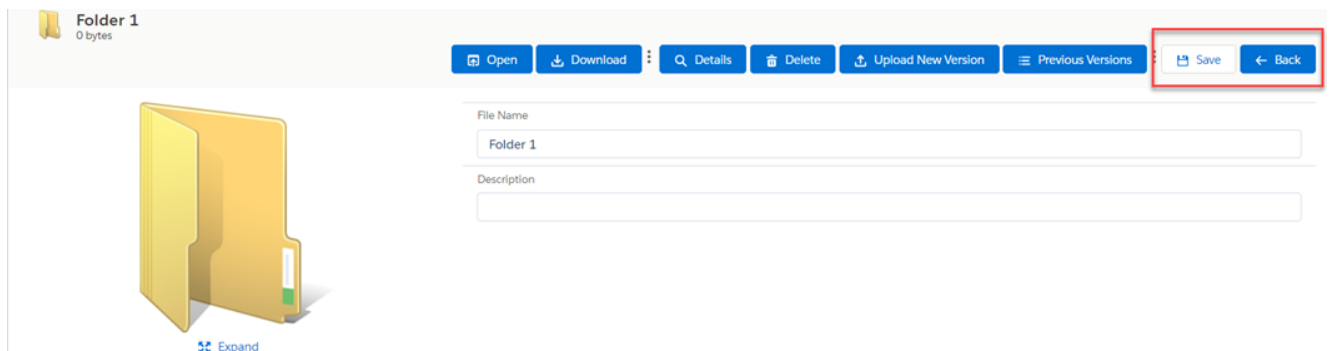
1. If you try to edit description of a file/folder that you do not have edit permissions, you'll get "You don't have enough permission to update this file!" error message (Figure 42).
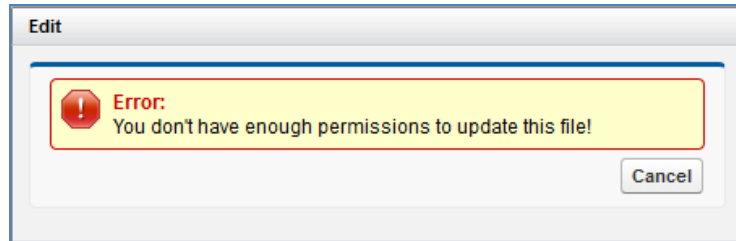
Figure 42

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 43).

Figure 43

After clicking this button, Copy URL pop-up will be displayed (Figure 44). Select the URL by clicking "Copy" button in this pop-up. You can close this pop-up by clicking "Close" button. After clicking "Copy" button, the button changes to "COPIED!" and the Copy URL for the picture becomes available for usage.
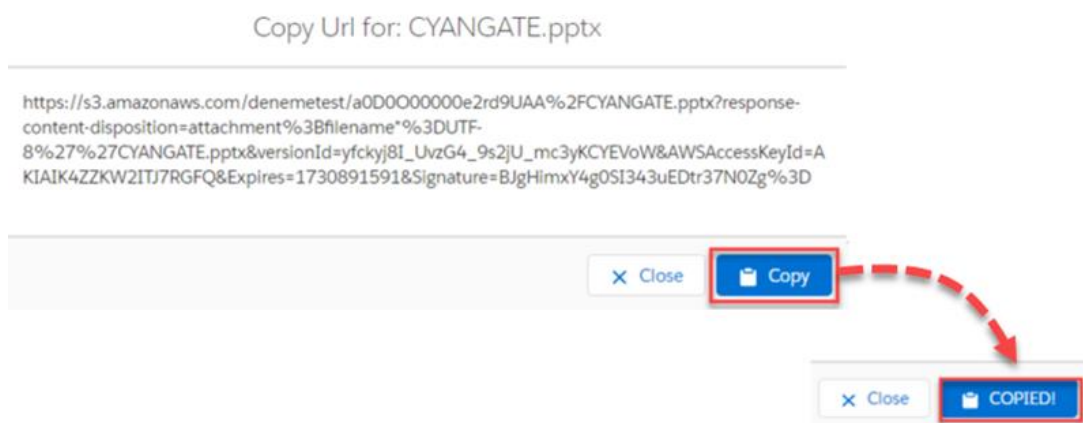
Figure 44

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 45).

Figure 45

![Notes icon]*Notes*
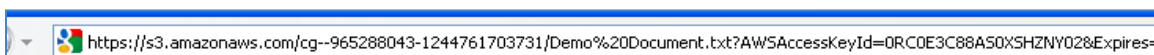
1. This feature is not enabled for folders. Because folders don't have URLs in S-Drive. "Copy URL" item menu action is invisible for the folders.

N. Sharing Files & Folders

S-Drive Folders supports object level sharing. You can share files and folders by clicking "Item Actions" button under "Actions" column and selecting **"Share"** action menu item from dropdown for individual files and folders (Figure 46).

☐	⬇	🗑	▼	📊 CYANGATE.pptx	2017-11-06 11:13:12
☐	⬇	🗑	Open	f (2).jpg	2017-11-06 11:13:10
☐	⬇	🗑	Download	der 1	2017-11-06 12:24:19
☐	⬇	🗑	Copy URL	der 2	2017-11-06 12:24:24
☐	⬇	🗑	Details	ructor Copy	2017-11-06 06:00:30
☐	⬇	🗑	Edit	rive Advanced Configuration Gui...	2017-11-06 11:13:14
☐	⬇	🗑	Delete	rive Advanced Configuration Gui...	2017-11-06 12:08:40
☐	⬇	🗑	Share	rive User Guide 1.28.pdf	2017-11-06 12:08:56
☐	⬇	🗑	Upload New Version		

Figure 46

Once you select "Share" action menu item, current shares on the file will be listed in a pop-up (Figure 47). You can review the shares on the object, add new shares, and edit/delete manual shares, using this screen.
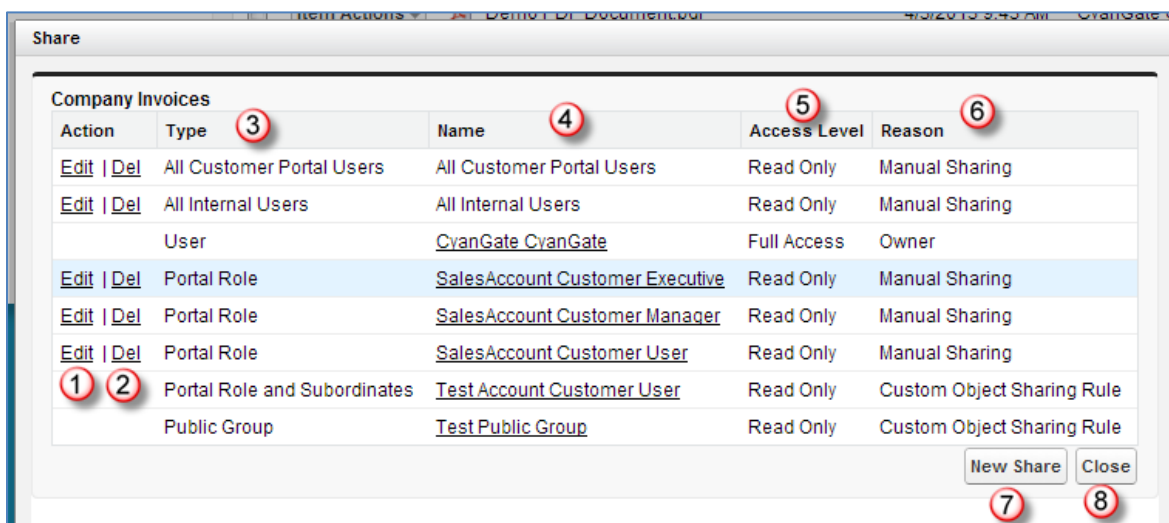
Figure 47

"Action" column is used to edit or delete the manual shares (Figure 47-1 and Figure 47-2). "Type" column displays the type (user, group, role etc.) of the sharing (Figure 47-3). "Name" column displays the name of the user/group/role etc. that item is shared (Figure 47-4). 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 47-5). "Reason" column displays the reason of the sharing

(Figure 47-6). 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 47-7) and close this screen by clicking "Close" button (Figure 47-8).

Once you click "New Share" button "Add New Share" page will be opened (Figure 48). You can select the "Type" from the dropdown (Figure 48-1). Once you select the type, available fields will be listed in "Available" section (Figure 48-2). You can select multiple items and click the arrows to move the items between "Available" and "Share With" sections (Figure 48-3). You can select "Read Only" or "Read/Write" from the "Access Level" section (Figure 48-4). 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 48-5).
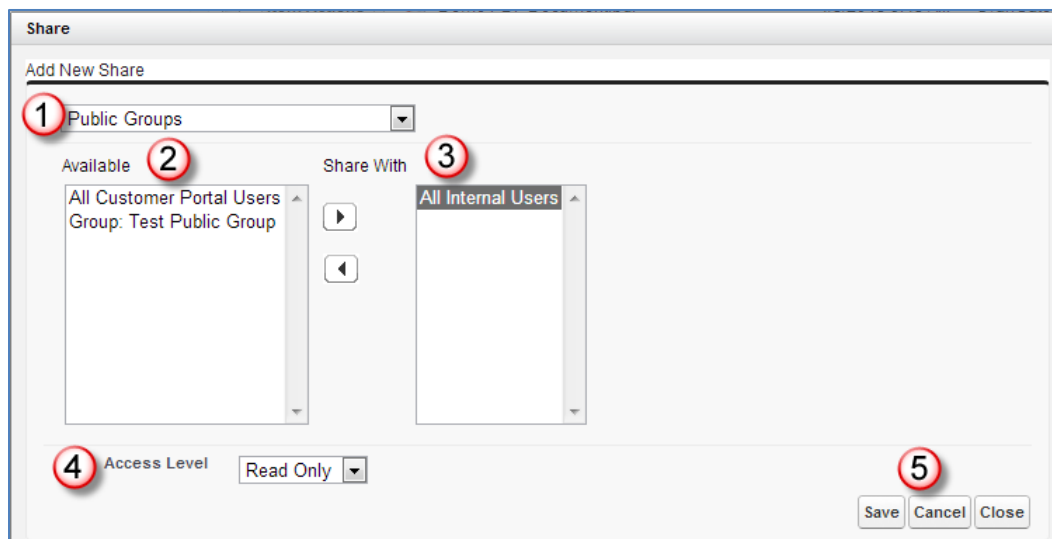
Figure 48

If you want to edit a sharing you can click "Edit" in the share lists screen (Figure 47-1). You can change selected object's access level and save (Figure 49).
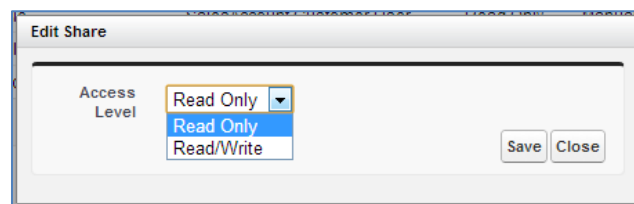
Figure 49

You can delete a manual sharing by clicking "Delete" in the share lists screen (Figure 47-2). If you select "Yes", share will be deleted (Figure 50).

Delete Share

Are you sure?

Yes | Cancel
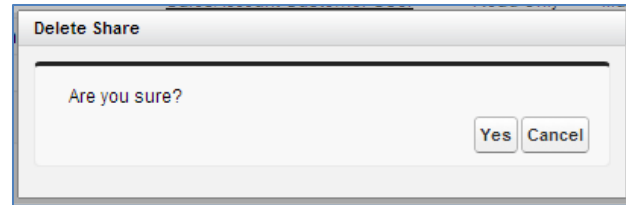
Figure 50

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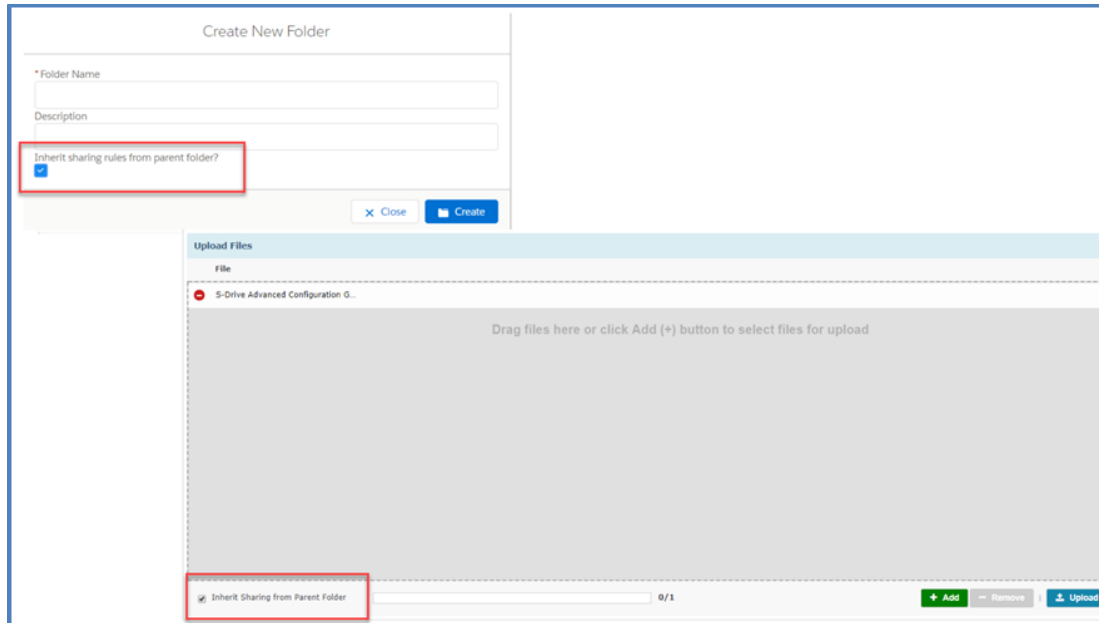
6. If there are profile level permission definitions, profile level permissions override the sharing settings. So, if "S3Objects"is set as read only for a profile, there is no meaning to give read/write access on a folder.

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. Uploading New Version 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 a file by clicking "Item Actions" button under "Actions" column and selecting **"Upload New Version"** action menu item from dropdown for individual files (Figure 52). Only HTML Upload Manager supports version upload.
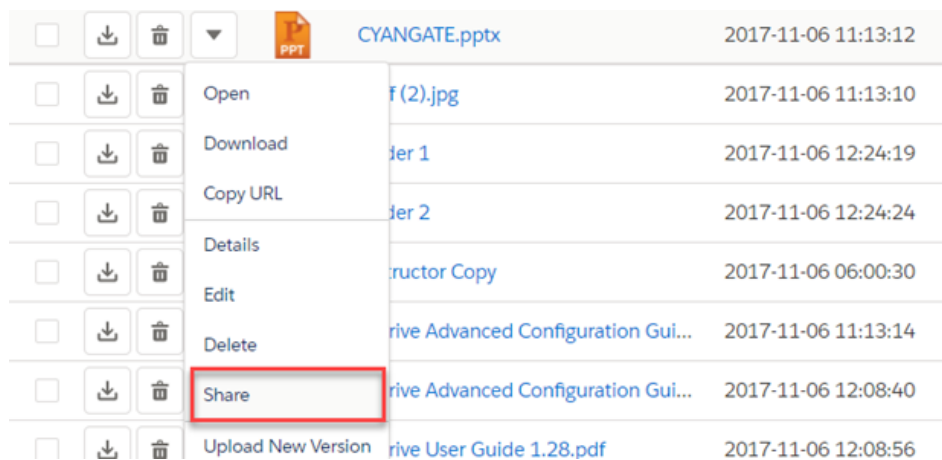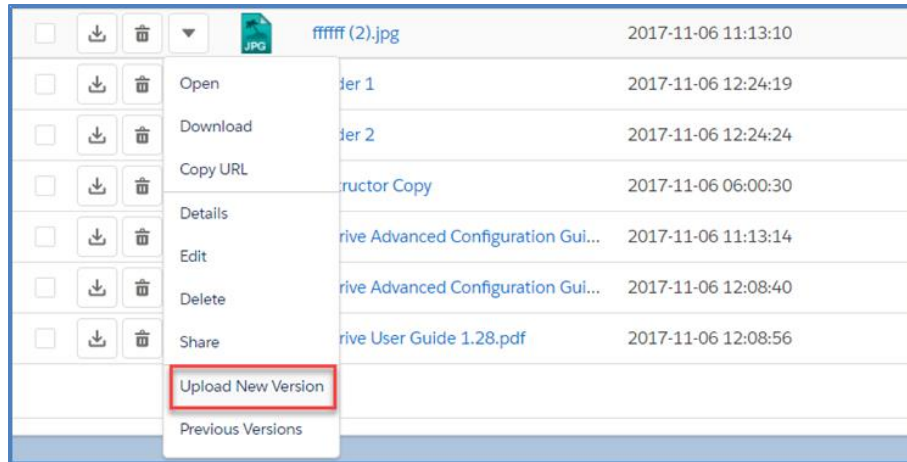
Figure 52

Upload page will be opened, and you will be able to upload new version. You can only upload one file at a time for version upload.

P. 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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 53).
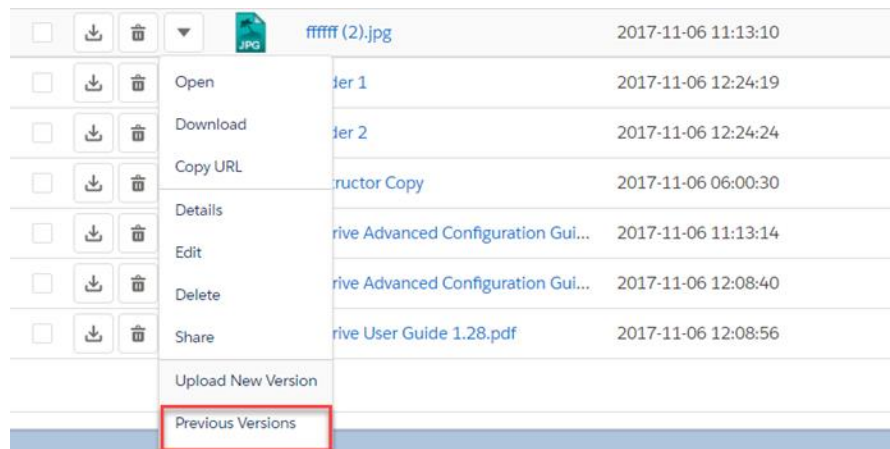
Figure 53

You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting **"Set Current"** action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file. (Figure 54)

All Rights Reserved - CyanGate LLC
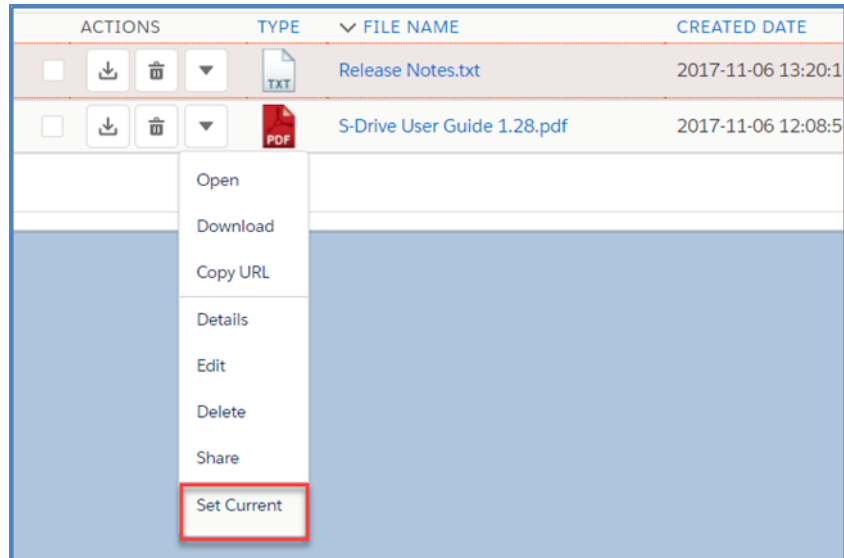
Figure 54

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

Q. 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 55).

You can use wildcards, '**** (multiple characters), **?** (single character)' in search keywords. For example: *exam*, boo?* etc.

Search results are displayed on the screen with a **"Search results: X file(s)."** header below the search bar. **"New Folder"**, **"Upload File(s)"**, **"Paste"** buttons are invisible in the search results screen. For closing the search, the button next to search results **"Close"** can be clicked and you will be directed to Home page. In order to return home, you can also click on **"Home"** button on the toolbar.

Figure 55

Notes
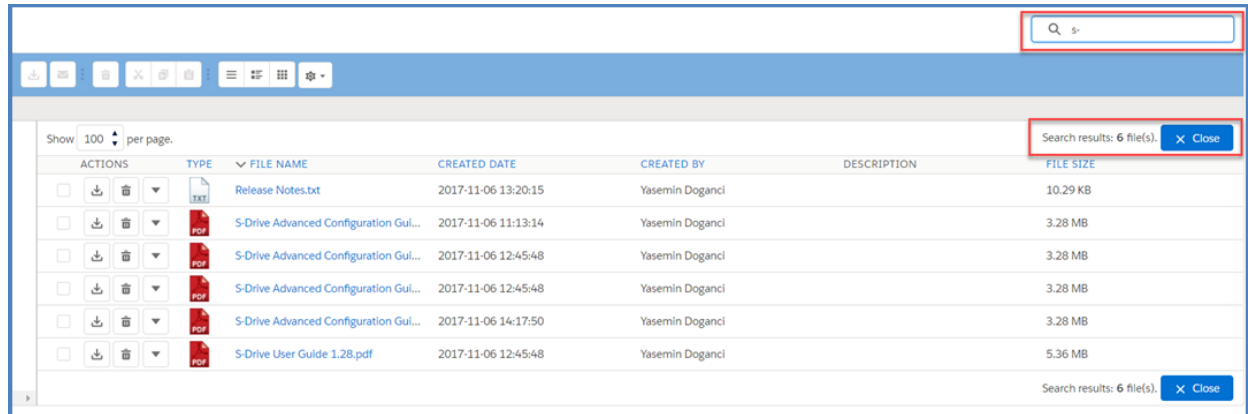
1. Salesforce.com does not index uploaded files immediately, so newly uploaded files will be eligible for search in a few minutes after the upload.

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 or with one character, you'll get an error message saying: "*Search key must be longer than 1 character.*" (Figure 56).
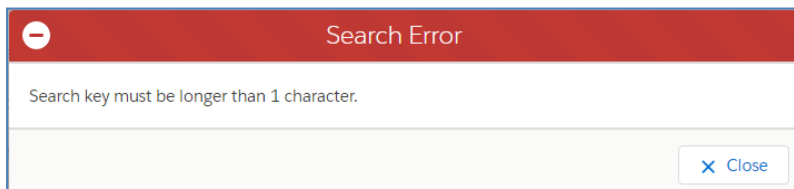
Figure 56

R. iOS (iPad, iPhone, iPod) Support

iOS (iPad, iPhone and iPod devices) support is improved for S-Drive Folders and S-Drive Attachments (Figure 57).
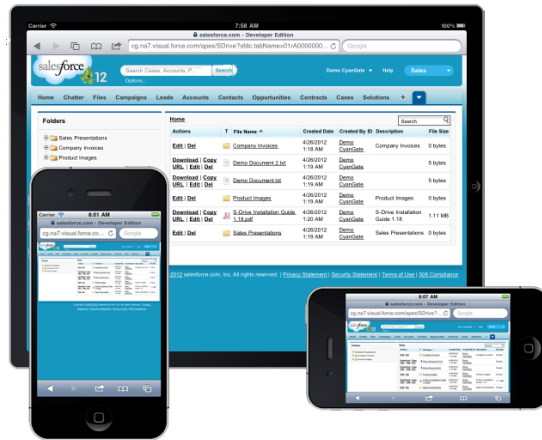
Figure 57

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 58).
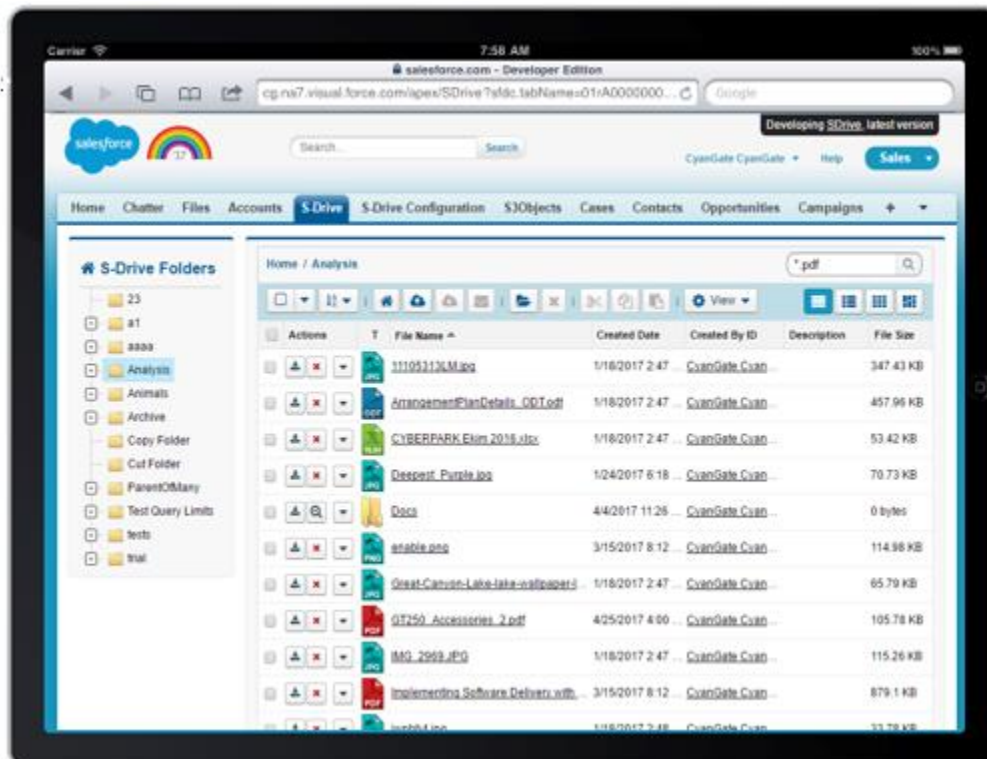
Figure 58

But currently you **cannot upload files, download files using Download Manager for bulk download** with your iOS device. Because iOS devices do 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 like 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 59).

Figure 59

All Rights Reserved - CyanGate LLC
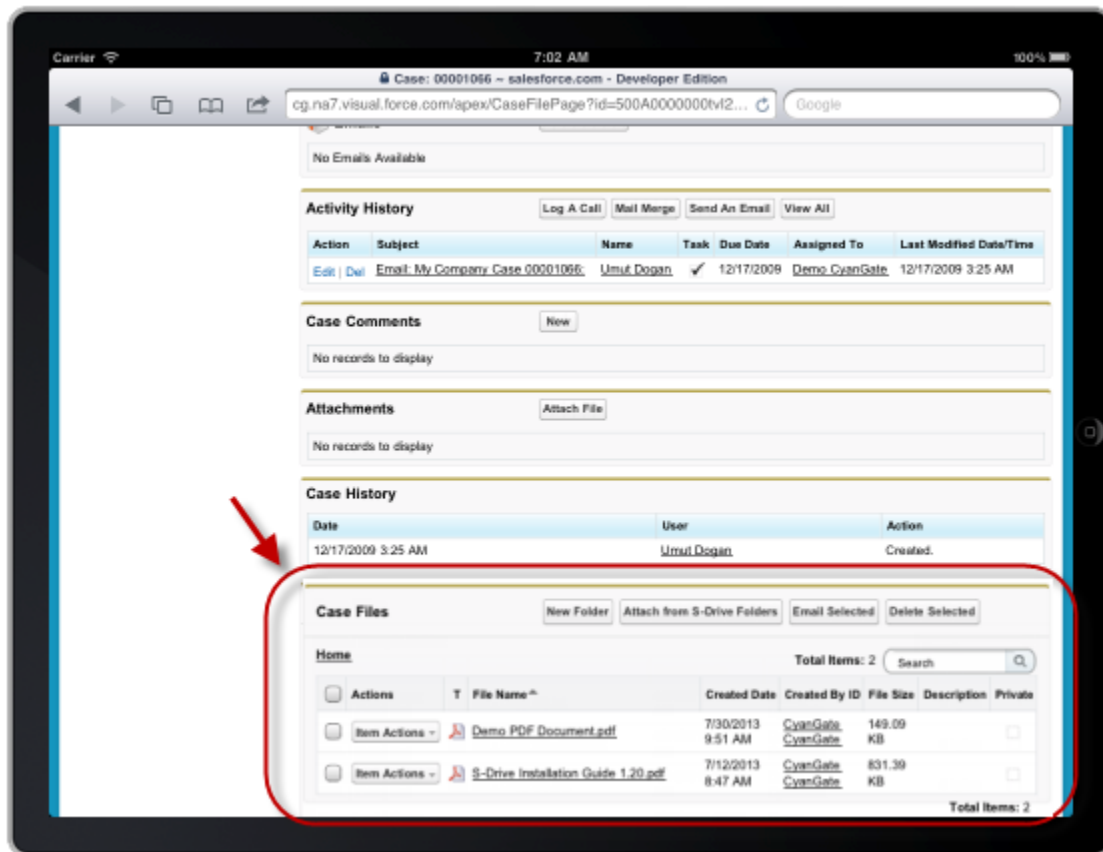
S. S-Drive Attachments

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 60). Otherwise please consult to the "S-Drive Installation Guide" to activate "Account Files" section.
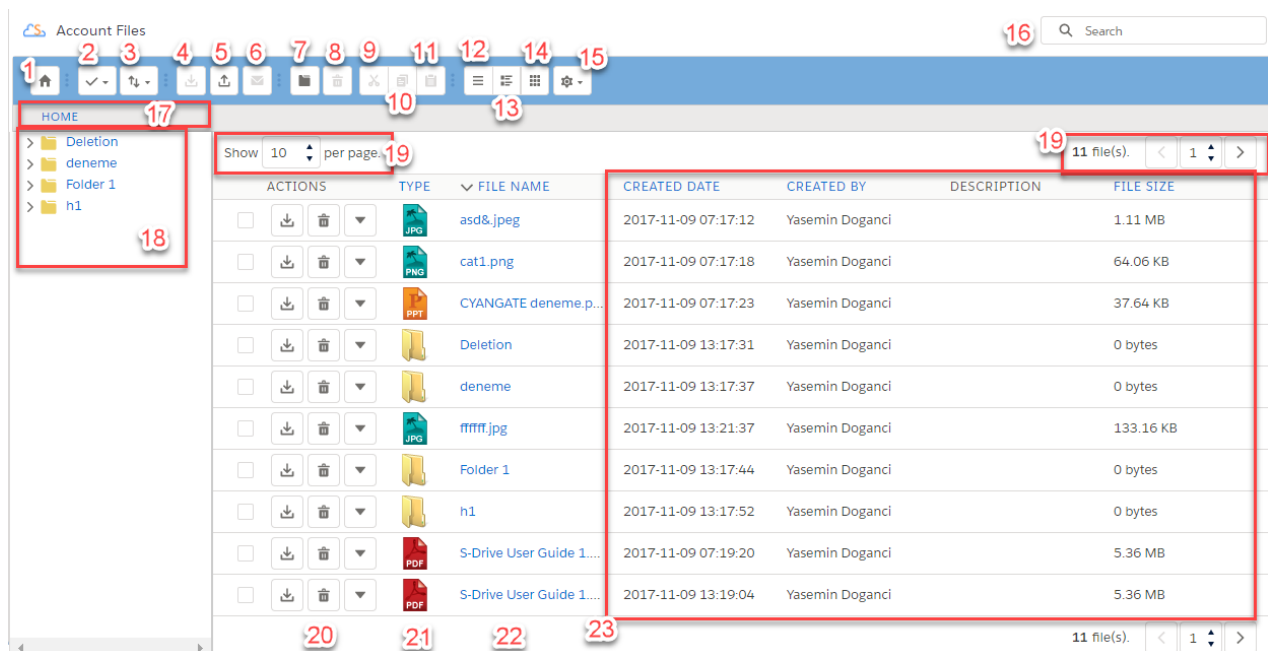
Figure 60

(1) **"Home"** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(3) **"Sort -Dropdown"** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s) to this account. See "Uploading Files" section for more information (Figure 60-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 60-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 60-7). When you click on this button **"Create New Folder"** screen pops up (Figure 61). This item is not displayed for the "Search Results View".

Create New Folder

* Folder Name

Description

X Close   Create
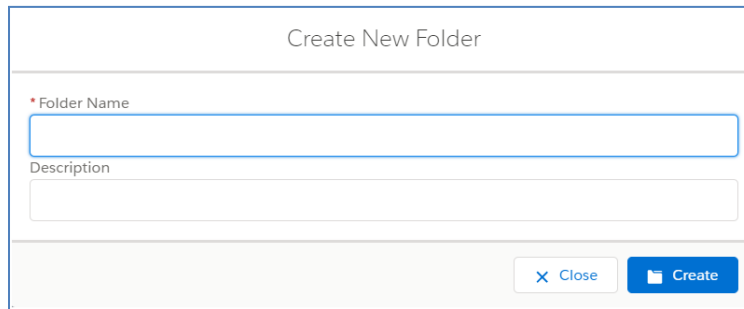
Figure 61

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 60-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 60-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 60-10).

(11) **"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 60-11). This item is not displayed for the "Search Results View".

(12) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(13) ⊟ It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(14) ⊞ It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(15) ⚙ ▾ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

      a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

      b. **"Save Sort Field as Default"**: If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

      c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 60-17) will not be shown in the panel.

      d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 60-18 will not be shown.

(16) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 60-16).

(17) "**Breadcrumb Folder Navigation**" 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 60-17). You can click any level to drill down to that subfolder.

(18) **"Folder Tree View"** displays your account's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(19) **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 60-19). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(20) **"Actions Column"** contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 60-20). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected account file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected account file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 62). This item menu action is only for files and not available for folders.

Copy Url for: CYANGATE.pptx

https://s3.amazonaws.com/denemetest/a0D0O00000e2rd9UAA%2FCYANGATE.pptx?response-content-disposition=attachment%3Bfilename*%3DUTF-8%27%27CYANGATE.pptx&versionId=yfckyj8I_UvzG4_9s2jU_mc3yKCYEVoW&AWSAccessKeyId=AKIAIK4ZZKW2ITJ7RGFQ&Expires=17308915918&Signature=BJgHimxY4g0SI343uEDtr37N0Zg%3D

✕ Close   📋 Copy

✕ Close   📋 COPIED!
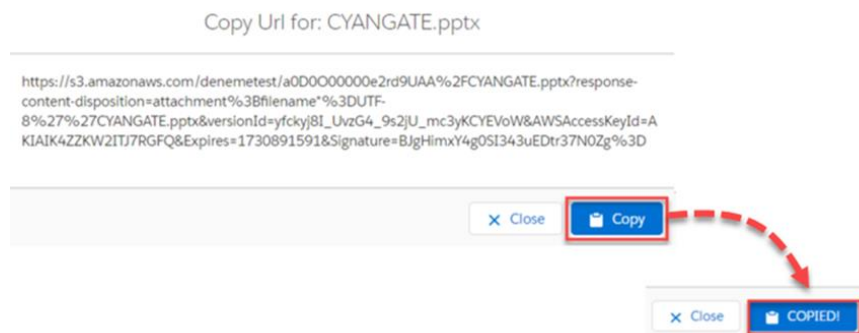
Figure 62

"Details" is used to open the details page of the selected account file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
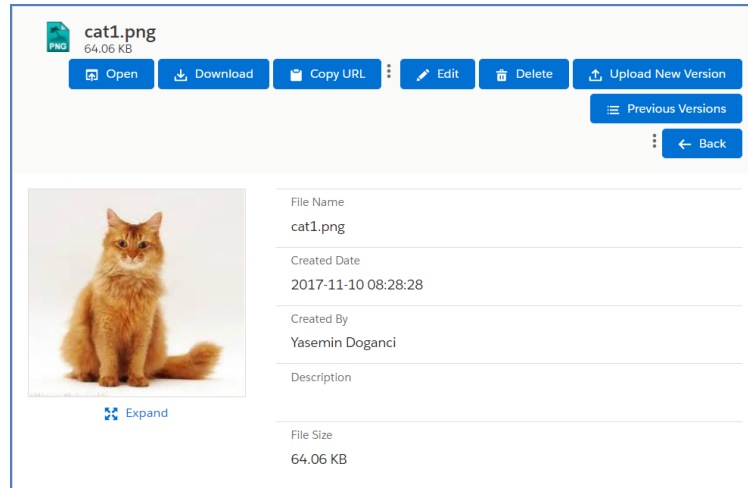
Figure 63

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 64) and you'll be able to edit current account file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
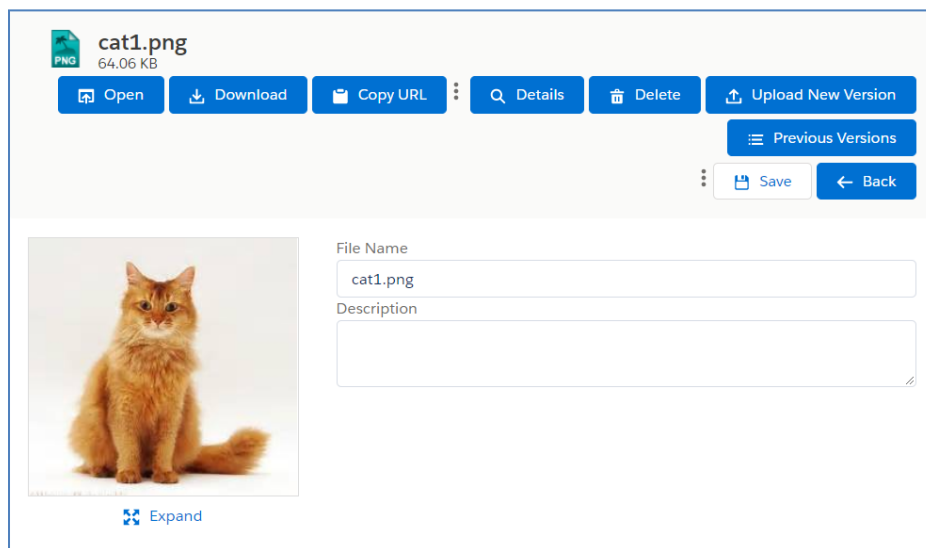
Figure 64

"Delete " is used to delete selected account file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

 "Upload New Version": *[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 item from dropdown for individual files (Figure 65). Only HTML Upload Manager supports version upload.
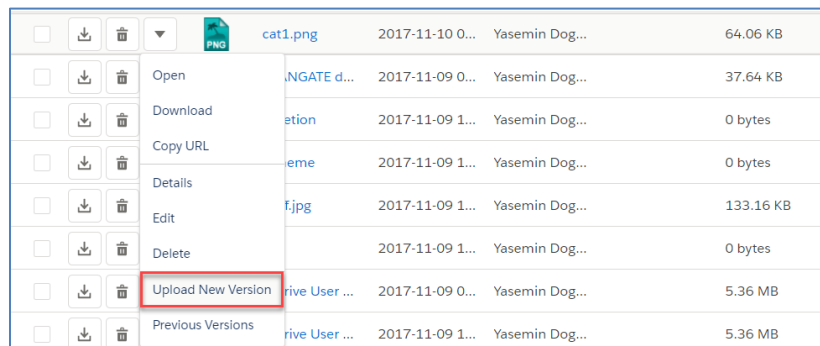
Figure 65

"Previous Versions": *[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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 66).
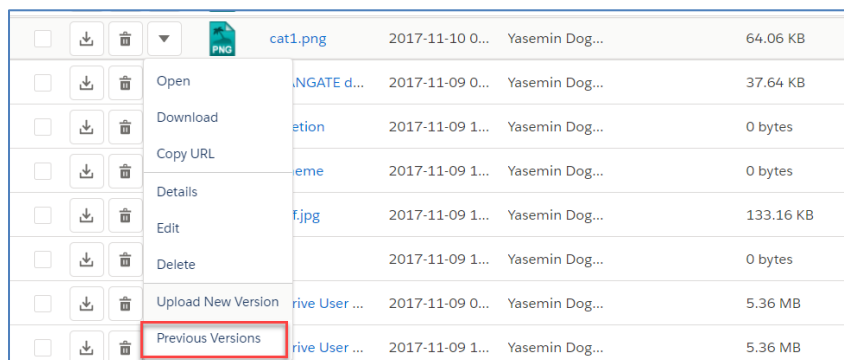
Figure 66

 "Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 67).
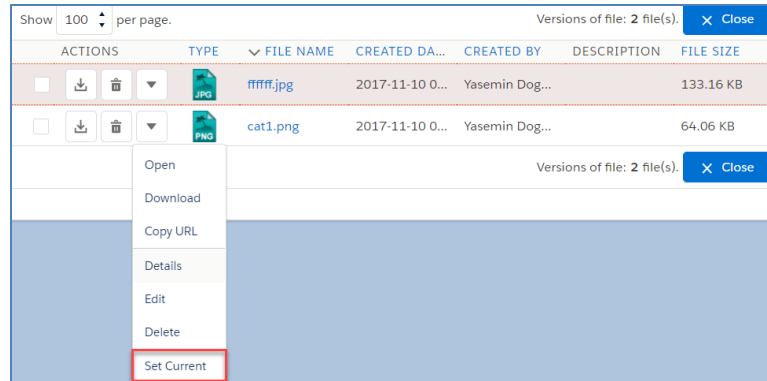
Figure 67

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(21) "Content Type Column" displays a type icon based on the content type of the account file/folder (Figure 60-21).

(22)"File Name Column" shows the file name information for the account files (Figure 60-22). You can sort files/folder ascending or descending by clicking the field header.

(23)"Customizable Field Columns" are used to display customizable fields (Figure 60-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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

There are account files attached to this account. You need to first delete account files manually and then delete the account!
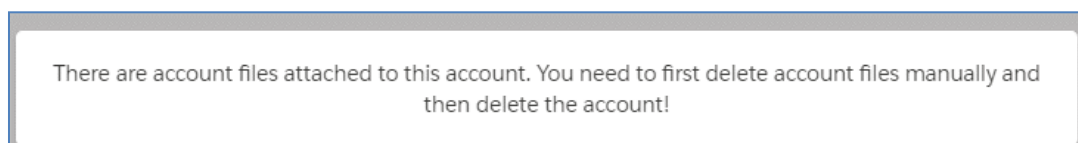
Figure 68

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 69). Otherwise please consult to the "*S-Drive Installation Guide*" to activate "Contact Files" section.
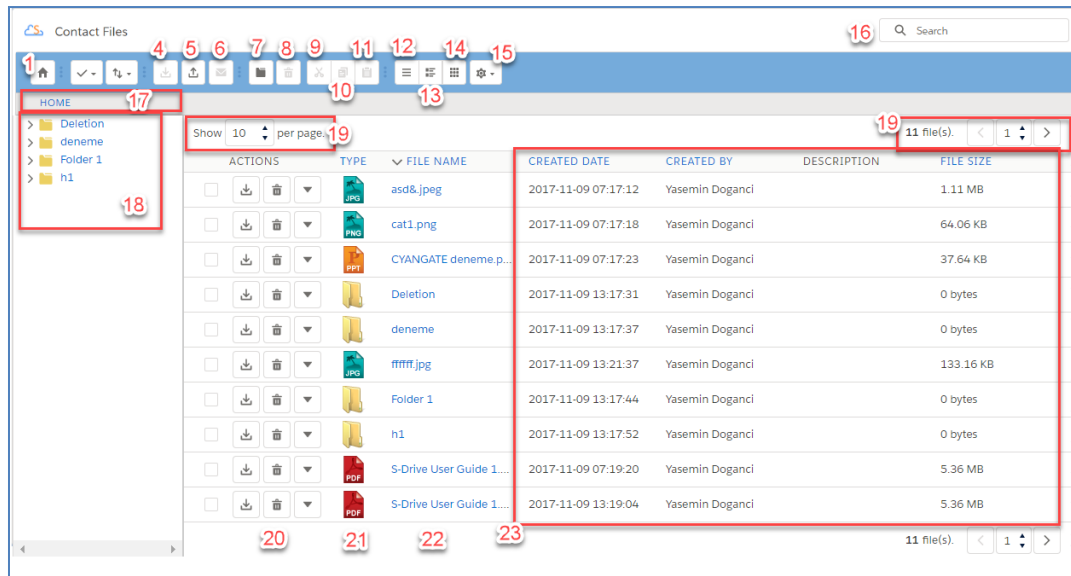
Figure 69

(1) **"Home"** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(3) **"Sort -Dropdown"** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 69-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 69-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 69-7). When you click on this button **"Create New Folder"** screen pops up (Figure 70). This item is not displayed for the "Search Results View".

<div style="border:1px solid #000; padding:10px; max-width:60%; margin:auto;">

Create New Folder

* Folder Name

[   ]

Description

[   ]

X Close   📁 Create

</div>
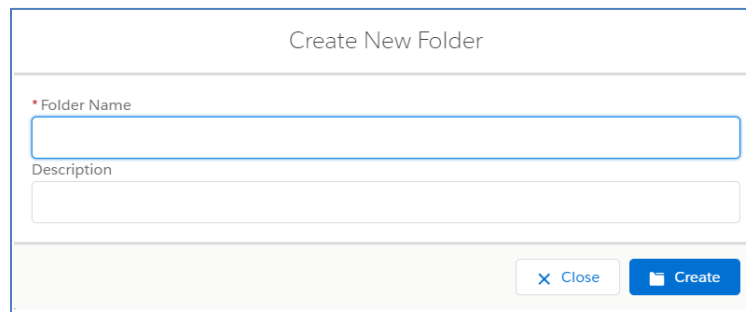
Figure 70

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 69-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 69-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 69-10).

(11) **"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 69-11). This item is not displayed for the "Search Results View".

(12) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(13) ▤ It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(14) ▦ It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(15) ⚙ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

    a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

    b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

    c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 69-17) will not be shown in the panel.

    d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 69-18 will not be shown.

(16) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 69-16).

(17) "**Breadcrumb Folder Navigation**" 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 69-17). You can click any level to drill down to that subfolder.

(18) **"Folder Tree View"** displays your contact's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(19) **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 69-19). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(20) "**Actions Column**" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 69-20). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected contact file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected contact file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 71). This item menu action is only for files and not available for folders.

Copy Url for: CYANGATE.pptx

https://s3.amazonaws.com/denemetest/a0D0O00000e2rd9UAA%2FCYANGATE.pptx?response-content-disposition=attachment%3Bfilename*%3DUTF-8%27%27CYANGATE.pptx&versionId=yfckyj8I_UvzG4_9s2jU_mc3yKCYEVoW&AWSAccessKeyId=AKIAIK4ZZKW2ITJ7RGFQ&Expires=1730891591&Signature=BJgHimxY4g0SI343uEDtr37N0Zg%3D

✕ Close   🗒 Copy

✕ Close   🗒 COPIED!
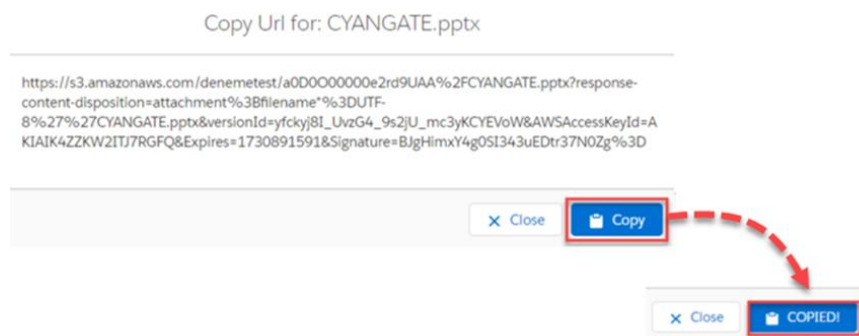
Figure 71

"Details" is used to open the details page of the selected contact file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
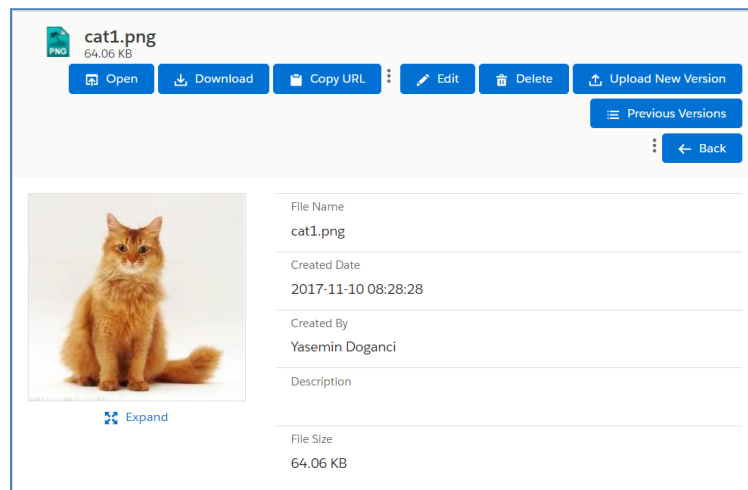
Figure 72

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 73) and you'll be able to edit current contact file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
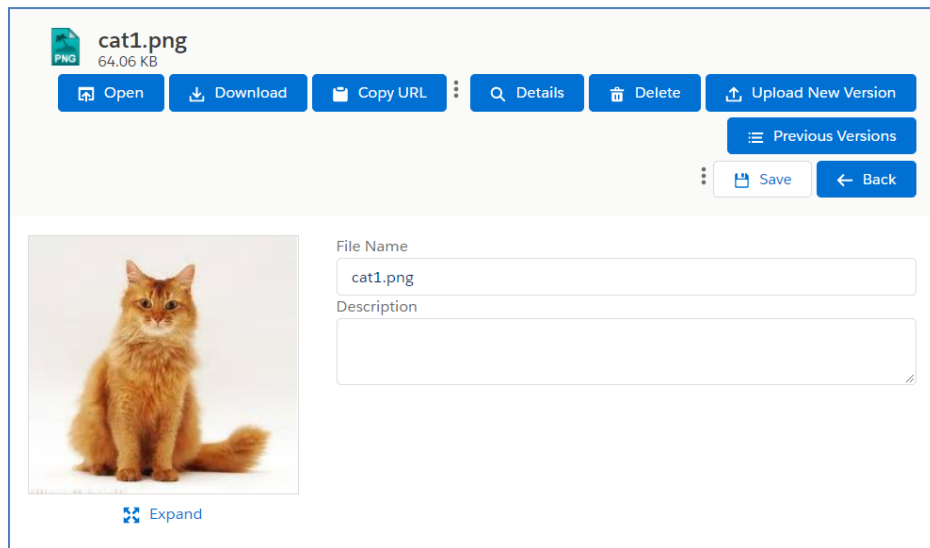
Figure 73

"Delete " is used to delete selected contact file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

"Upload New Version": *[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 item from dropdown for individual files (Figure 74). Only HTML Upload Manager supports version upload.
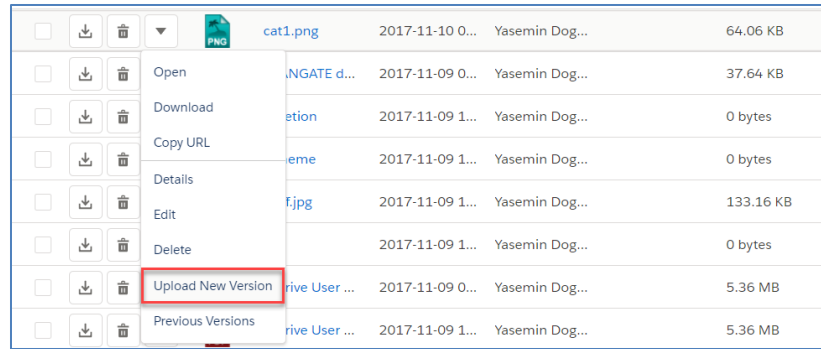
Figure 74

"Previous Versions": *[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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 75).
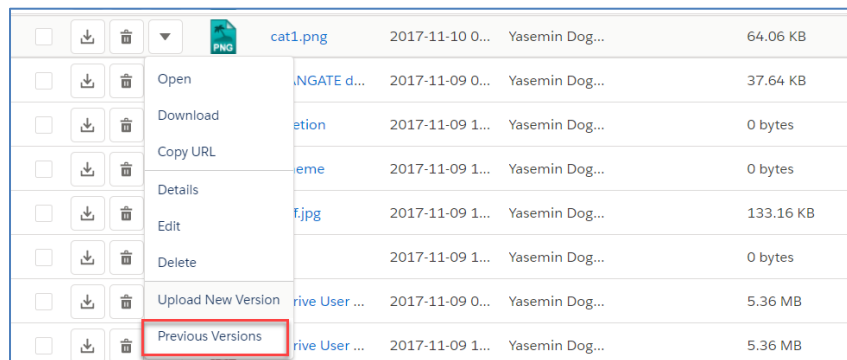
Figure 75

 "Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 76).
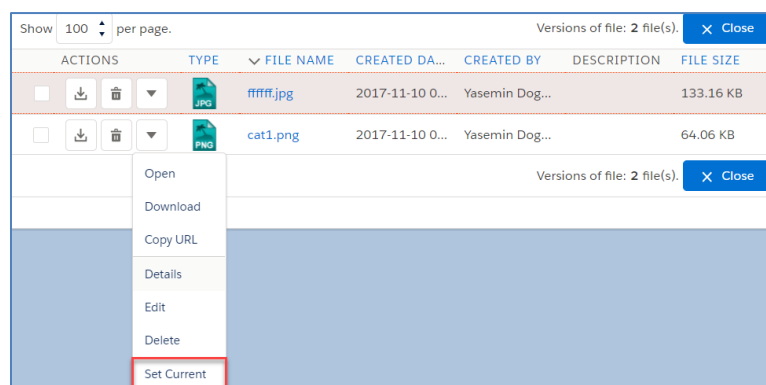
Figure 76

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(21) "Content Type Column" displays a type icon based on the content type of the contact file/folder (Figure 69-21).

(22)"File Name Column" shows the file name information for the contact files (Figure 69-22). You can sort files/folder ascending or descending by clicking the field header.

"Customizable Field Columns" are used to display customizable fields (Figure 69-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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 77). You need to delete contact files first, and then you can delete the contact.

> There are contact files attached to this contact. You need to first delete contact files manually and then delete the contact!
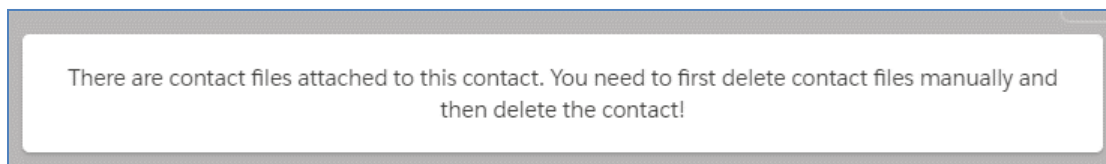
<p align="center">**Figure 77**</p>

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 78). Otherwise please consult to the "S-Drive Installation Guide" to activate "Opportunity Files" section.
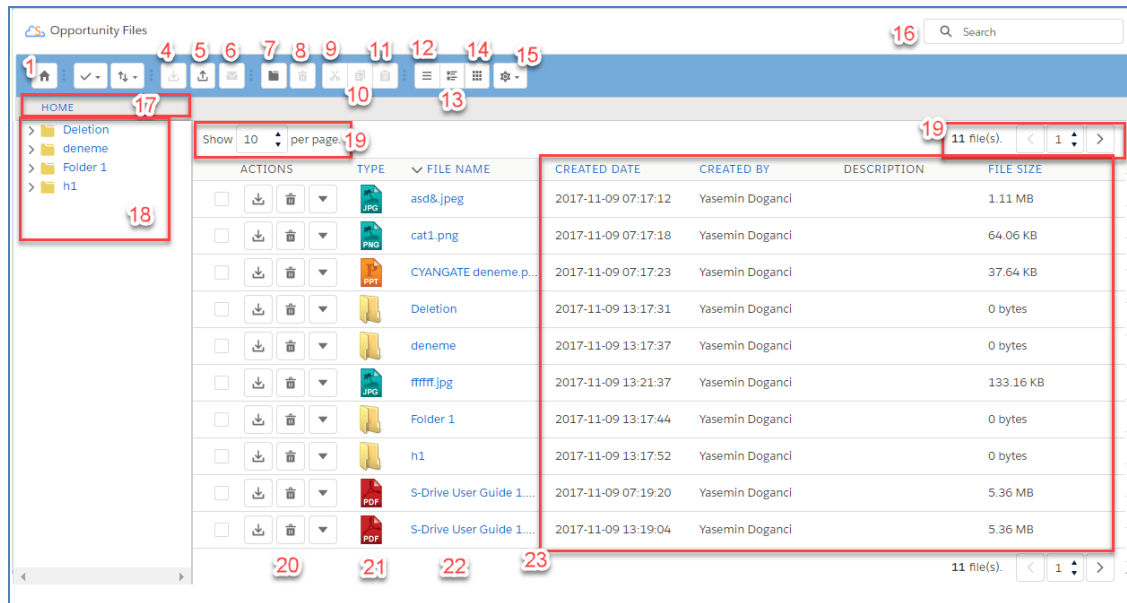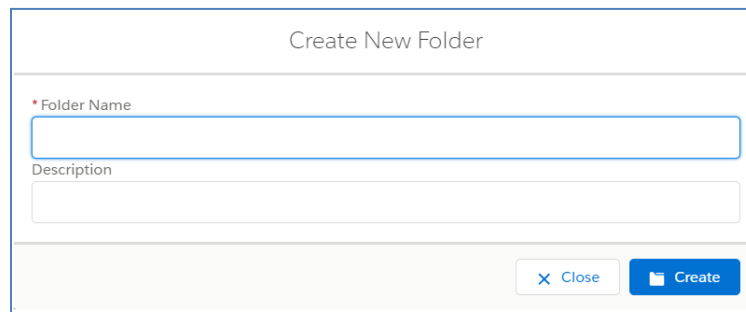
Figure 78

(1) **"Home"** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(3) **"Sort -Dropdown"** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 78-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 78-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 78-7). When you click on this button **"Create New Folder"** screen pops up (Figure 79). This item is not displayed for the "Search Results View".

<div style="border:1px solid #ccc; padding:1em;">

Create New Folder

* Folder Name

[   ]

Description

[   ]

× Close   📁 Create

</div>

<div align="center">**Figure 79**</div>

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 78-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 78-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 78-10).

(11) **"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 78-11). This item is not displayed for the "Search Results View".

(12) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(13) 📑 It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(14) ▦ It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(15) ⚙️ ▾ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 78-17) will not be shown in the panel.

d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 78-18 will not be shown.

(16) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 78-16).

(17) "**Breadcrumb Folder Navigation**" 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 78-17). You can click any level to drill down to that subfolder.

(18) **"Folder Tree View"** displays your opportunity's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(19) **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 78-19). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(20) "**Actions Column**" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 78-20). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected opportunity file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected opportunity file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 80). This item menu action is only for files and not available for folders.
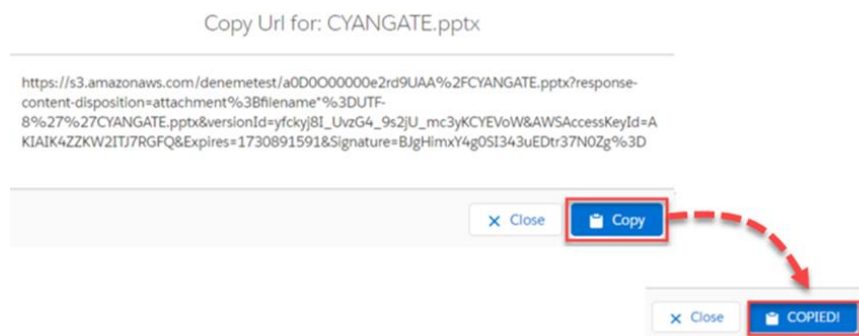
Figure 80

 "Details" is used to open the details page of the selected opportunity file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
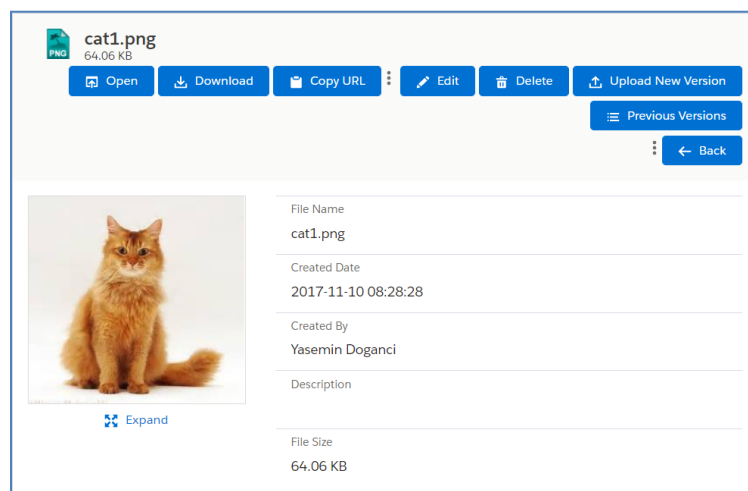
Figure 81

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 82) and you'll be able to edit current opportunity file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
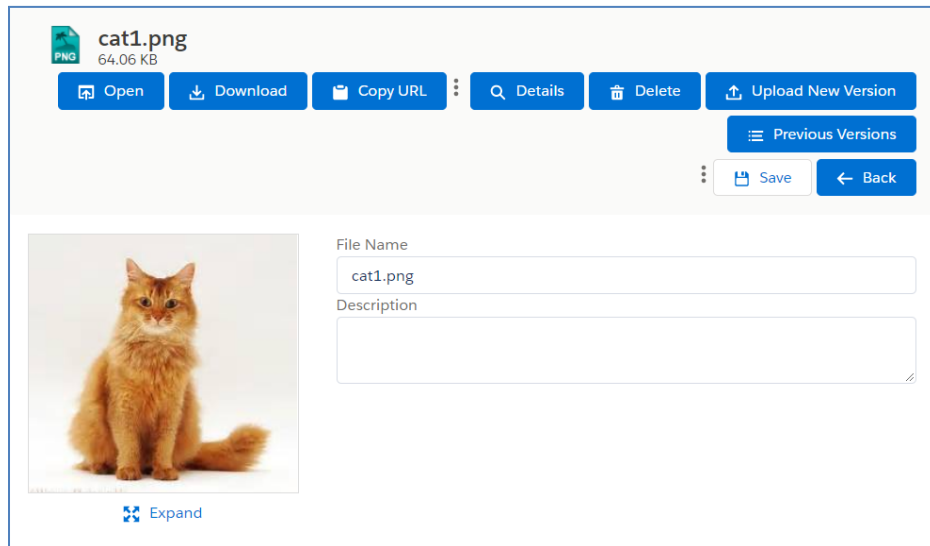
Figure 82

"Delete " is used to delete selected opportunity file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

"Upload New Version": *[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 item from dropdown for individual files (Figure 83). Only HTML Upload Manager supports version upload.
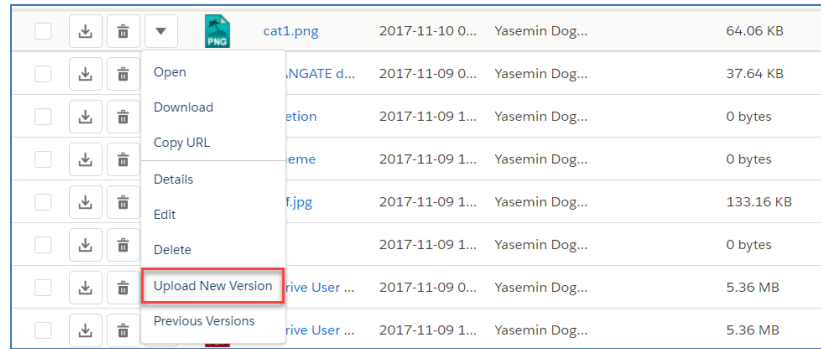
Figure 83

"Previous Versions": *[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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 84).
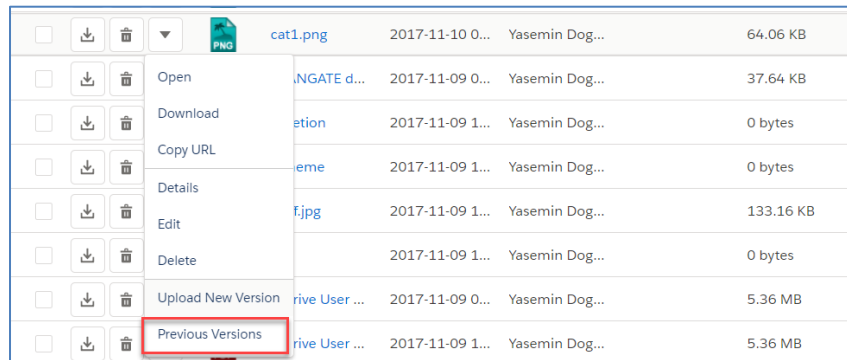
Figure 84

 "Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 85).
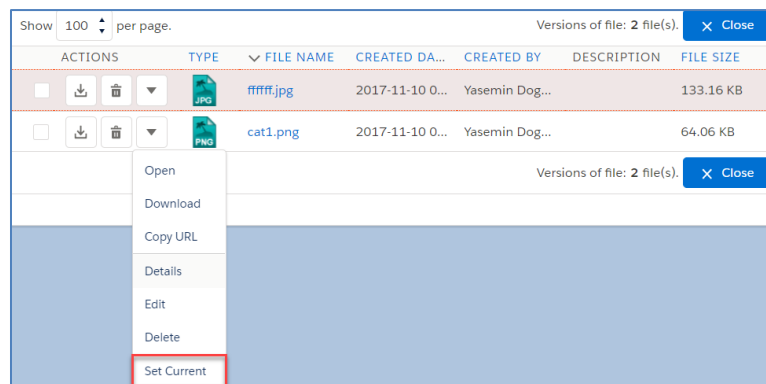
Figure 85

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(21) "Content Type Column" displays a type icon based on the content type of the opportunity file/folder (Figure 78-21).

(22)"File Name Column" shows the file name information for the opportunity files (Figure 78-22). You can sort files/folder ascending or descending by clicking the field header.

1. **"Customizable Field Columns"** are used to display customizable fields (Figure 78-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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 86). You need to delete opportunity files first, and then you can delete the opportunity.

There are opportunity files attached to this opportunity. You need to first delete opportunity files manually and then delete the opportunity!

Figure 86

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 87). Otherwise please consult to the "S-Drive Installation Guide" to activate "Case Files" section.
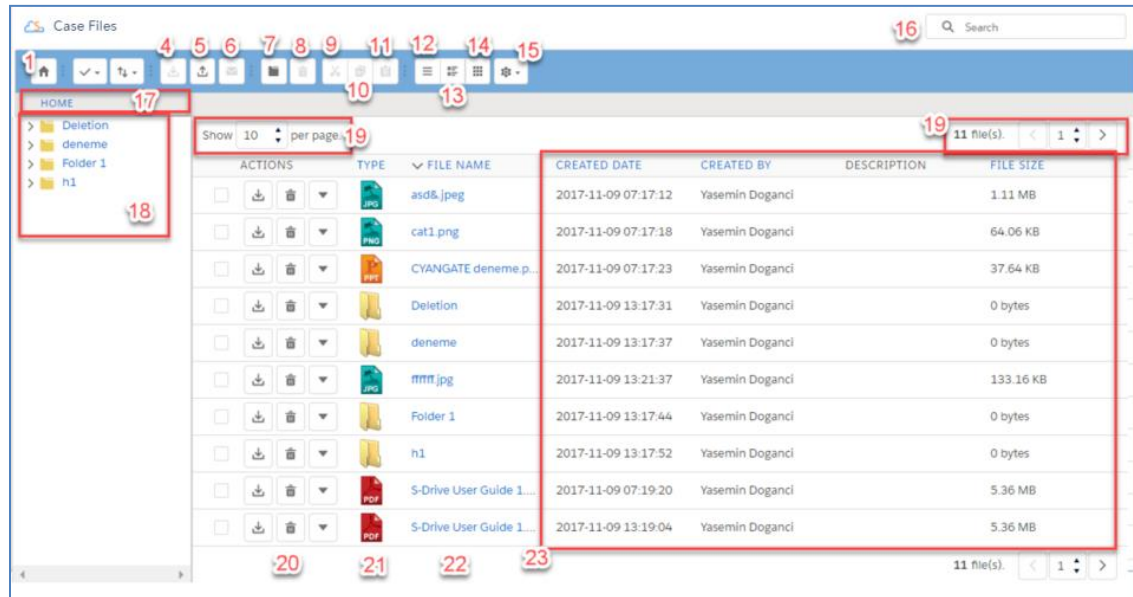
Figure 87

(1) **"Home"** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(3) **"Sort -Dropdown"** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 87Figure 78-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 87-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 87-7). When you click on this button **"Create New Folder"** screen pops up (Figure 88). This item is not displayed for the "Search Results View".

Create New Folder

* Folder Name

Description

✕ Close   📁 Create
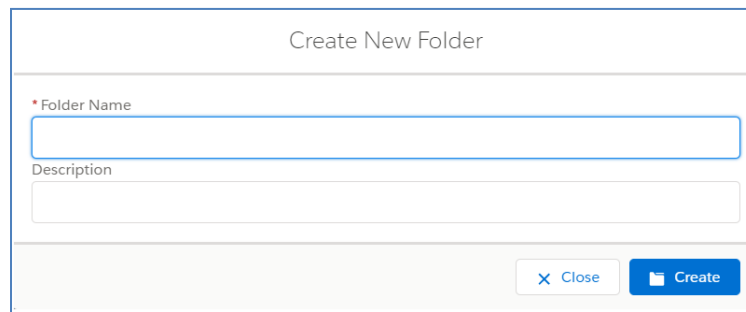
Figure 88

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 87-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 87-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 87-10).

(11) **"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 87-11). This item is not displayed for the "Search Results View".

(12) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(13) ▤ It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(14) ▦ It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(15) ⚙️ ▾ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

    a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

    b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

    c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 87-17) will not be shown in the panel.

    d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 87-18 will not be shown.

(16) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 87-16).

(17) "**Breadcrumb Folder Navigation**" 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 87-17). You can click any level to drill down to that subfolder.

(18) **"Folder Tree View"** displays your case's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(19) **"Total Items / Pagination"** displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 87-19). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(20) "**Actions Column**" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 87-20). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected case file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected case file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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 89). This item menu action is only for files and not available for folders.

Copy Url for: CYANGATE.pptx

https://s3.amazonaws.com/denemetest/a0D0O00000e2rd9UAA%2FCYANGATE.pptx?response-content-disposition=attachment%3Bfilename*%3DUTF-8%27%27CYANGATE.pptx&versionId=yfckyj8I_UvzG4_9s2jU_mc3yKCYEVoW&AWSAccessKeyId=AKIAIK4ZZKW2ITJ7RGFQ&Expires=1730891591&Signature=BJgHimxY4g0SI343uEDtr37N0Zg%3D
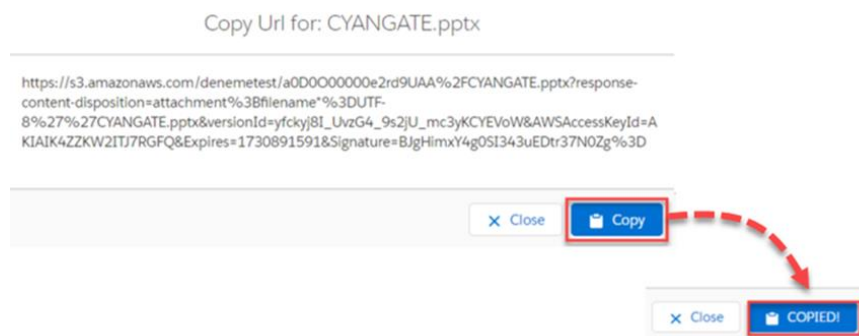
Figure 89

 "Details" is used to open the details page of the selected case file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page.
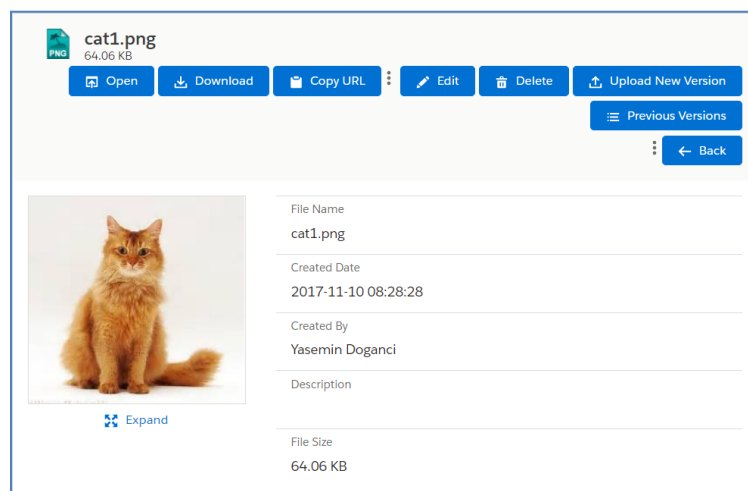

Figure 90

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page will be opened (Figure 91) and you'll be able to edit current case file's/folder's editable fields. Edit the fields, then click "Save". After clicking "Save", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
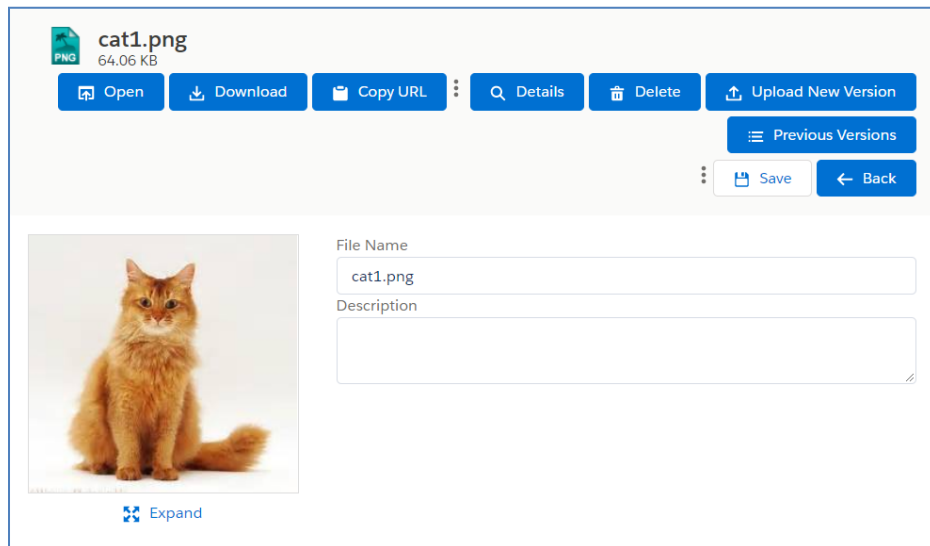
"Delete " is used to delete selected case file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

 "Upload New Version": *[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 item from dropdown for individual files (Figure 92). Only HTML Upload Manager supports version upload.
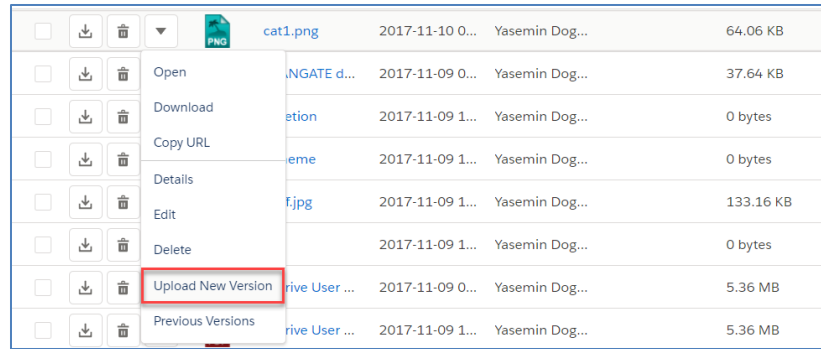
Figure 92

"Previous Versions": *[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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 93).
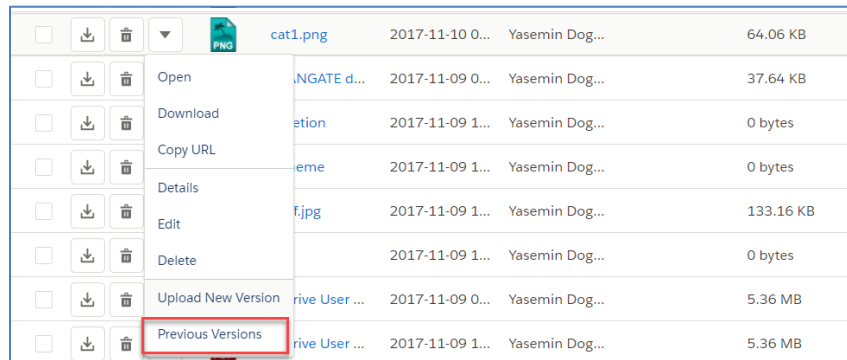
Figure 93

 "Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 94).

Figure 94

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(21) "Content Type Column" displays a type icon based on the content type of the case file/folder (Figure 87-21).
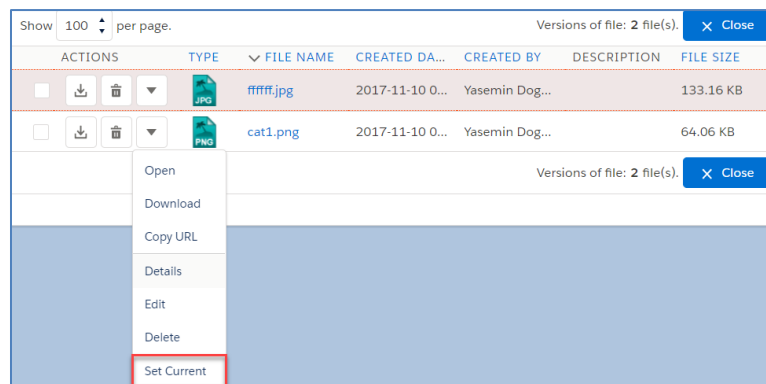
(22)"File Name Column" shows the file name information for the case files (Figure 87-22). You can sort files/folder ascending or descending by clicking the field header.

(23)"Customizable Field Columns" are used to display customizable fields (Figure 87-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

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 95). You need to delete case files first, and then you can delete the case.

There are case files attached to this case. You need to first delete case files manually and then delete the case!
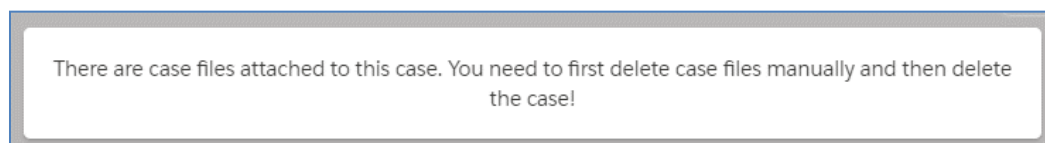
Figure 95

2. You can use "Case Files" feature from "Customer Portal" or "Community" also. After making required configuration for customer portal or community (See *S-Drive Advanced Configuration Guide* for more information), your customers can add case files to cases using "Customer Portal Interface" (Figure 96).

	Actions	File Name	File Size	Created By	Created Date	Description
☐	Download	Edit	Del	Demo Document.txt	15 bytes	Bulent Dogan	8/21/2009 6:30 AM	

Figure 96

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 97). Otherwise please consult to the "*S-Drive Advanced Configuration Guide*" to activate "<Your Object Name> Files" section.
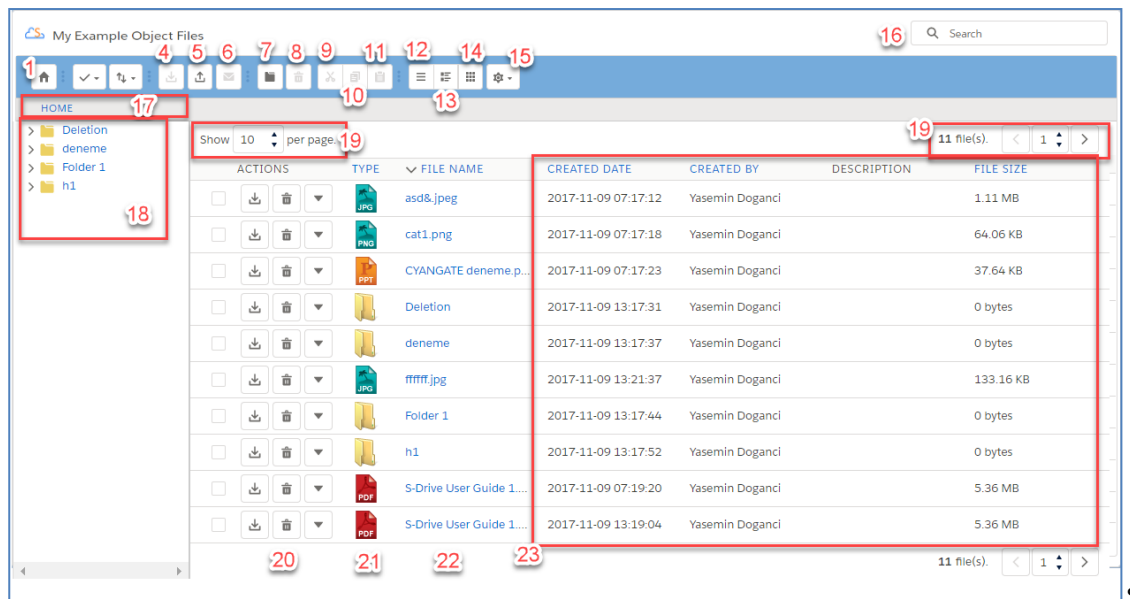

Figure 97

(1) **"Home"** button is used to direct to root folder of S-Drive Attachments from any sub-folder or search.

(2) **"Select All -Dropdown"** button is used to *Select All* or *Deselect All* items in the list.

(3) **"Sort -Dropdown"** button is used to sort the File List. If a field selected (i.e. Create Date) files sorted by selected field as ascending order. If same field selected again it is sorted by descending order.

(4) **"Download File(s)"** button is used to download selected file(s). If just one file selected it directly download file. If more than one file or folder are selected, it creates a zip file and download it.

(5) **"Upload File(s)"** button is used to upload file(s). See "Uploading Files" section for more information (Figure 97-5). This item is not displayed for the "Search Results View".

(6) **"Email Files"** button is used to email files. See "Emailing Files" section for more information (Figure 97-6).

(7) **"Create New Folder"** button is used to create folders. See "Creating Folders" section for more information (Figure 97-7). When you click on this button **"Create New Folder"** screen pops up (Figure 98). This item is not displayed for the "Search Results View".
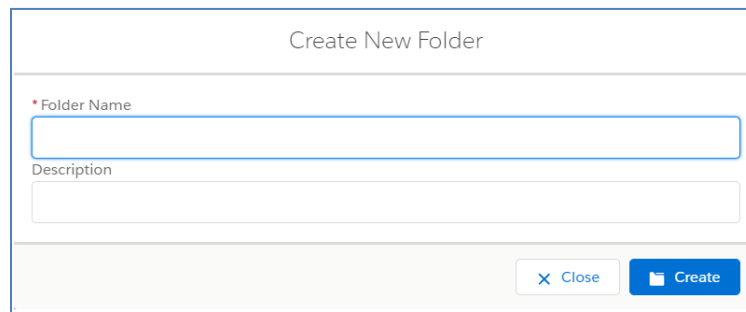

Create New Folder

* Folder Name

Description

✕ Close   📁 Create

Figure 98

(8) **"Delete Selected File(s)"** button is used to delete file(s) or folder(s). See "Deleting Files" and "Deleting Folders" sections for more information (Figure 97-8).

(9) **"Cut"** button is used to move file(s) between folders. See "Moving Files" section for more information (Figure 97-9).

(10) **"Copy"** button is used to copy file(s) between folders. See "Copying Files" sections for more information (Figure 97-10).

(11) **"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 97-11). This item is not displayed for the "Search Results View".

(12) ☰ It changes current view to **List** view. For more information, you can look at **View Types** section.

(13) It changes current view to **Thumbnail** view. For more information, you can look at **View Types** section.

(14) It changes current view to **Grid** view. For more information, you can look at **View Types** section.

(15) ⚙️▾ By **"Settings"** dropdown menu button, you can set current View Type of S-Drive Folders page as default and set current Sort Field as default. Also, you can select whether to Hide Breadcrumbs and/or Hide Folders Tree View.

    a. **"Save View Type as Default"**: If this item is selected, it saves current view type to settings. When S-Drive page is opened, File List is shown in selected view type by default.

    b. "**Save Sort Field as Default**": If this item selected, it saves current sort field to settings. When S-Drive page is opened, *File List* is ordered by selected field.

    c. **"Hide Breadcrumbs"**: If this item is selected, breadcrumbs (Figure 97-17) will not be shown in the panel.

    d. **"Hide Folders Tree View"**: If this item is selected, left panel shown in Figure 97-18 will not be shown.

(16) "**Search Box**" is used to search items (files, folders) in S-Drive Folders. Refer to the "Searching Items" section for more information (Figure 97-16).

(17) "Breadcrumb Folder Navigation" 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 97-17). You can click any level to drill down to that subfolder.

(18) "Folder Tree View" displays your object's folder structure. Your home folder is named as **"Home"** and your 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 show its contents on the panel when clicked.

(19) "Total Items / Pagination" displays total items in selected folder and pagination if numbers of items are greater than the configured pagination number (Figure 97-19). If item (file/folder) count in a folder is greater than 10 (can be changed from the left side), items are displayed with pagination and total items are displayed next to the page numbers. 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.

(20) "Actions Column" contains a quick download and a quick delete button. It also contains **"Item Actions"** button (Figure 97-20). Once you click "Item Actions" button, dropdown is opened with list of item menu actions.

"Open" is used to open the selected opportunity file. After clicking this link, a new browser tab will be opened, and you will be able to view the file in this new tab.

"Download" is used to download selected opportunity file. After clicking this link, the download process will begin automatically, and you will be able to find the file under your computer's "Downloads" folder.

"Copy URL" is 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). This item menu action is only for files and not available for folders.
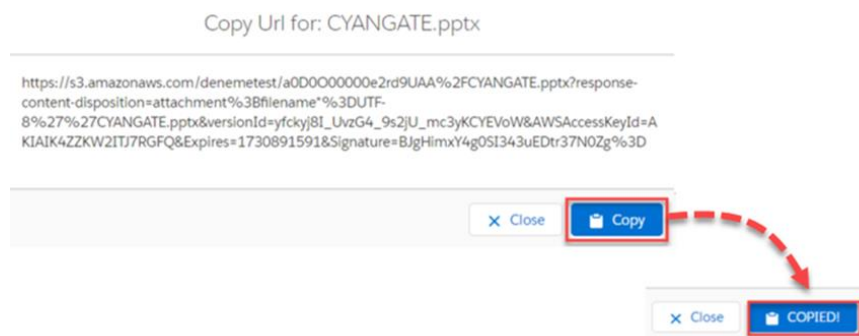
"Details" is used to open the details page of the selected opportunity file or folder. In details page, it is possible to see the detailed information about that file or folder. Also, if the preview and thumbnails option is enabled, the thumbnail of a file can also be viewed from this page. (Figure 100)
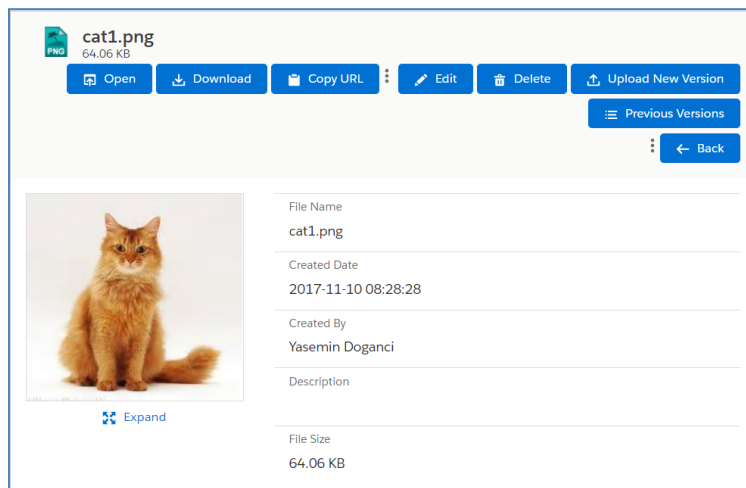

Figure 100

"Edit" is used to edit fields of a selected file/folder. After clicking this link; the edit page 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", the fields you have edited will be saved. You can click on "Back" button to go back to previous page.
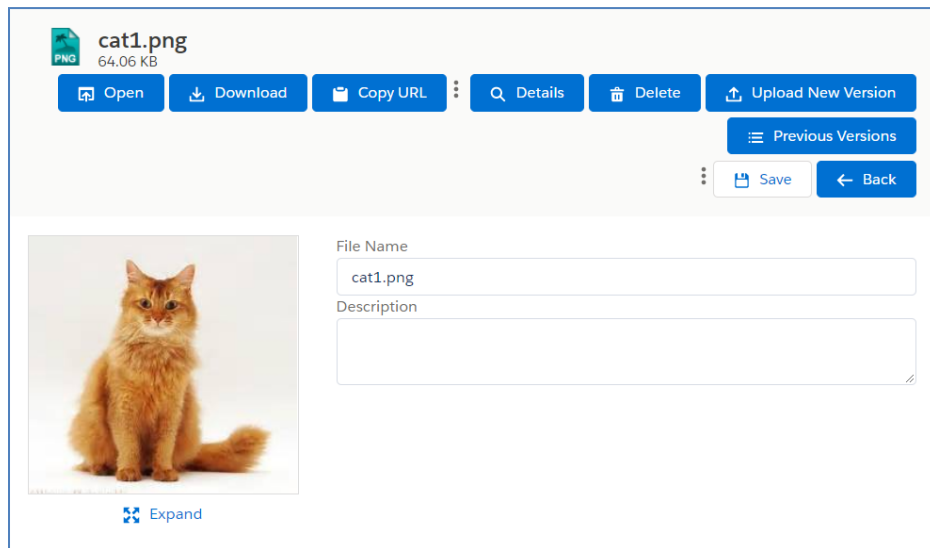
"Delete " is used to delete selected opportunity file/folder. After clicking this link, you'll get a warning message. Select "Yes" to delete the file/folder, "Cancel" to cancel. If you click "Yes", delete process will start.

Notes

1. If versioning is enabled and selected file has versions, all versions of selected file will also be deleted.

 "Upload New Version": *[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 item from dropdown for individual files (Figure 102). Only HTML Upload Manager supports version upload.
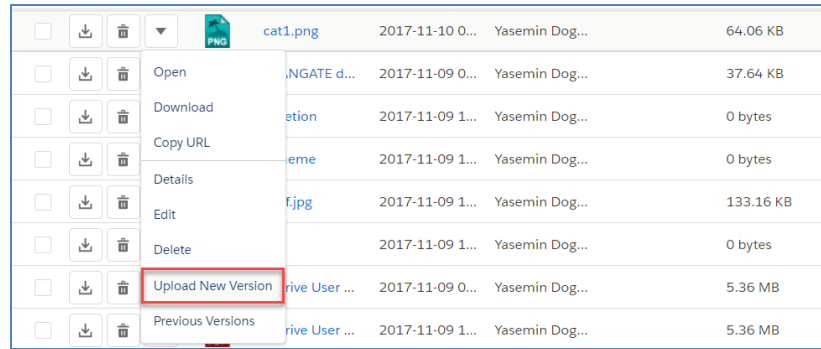
Figure 102

"Previous Versions": *[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 file by clicking "Item Actions" button under "Actions" column and selecting **"Previous Versions"** action menu item from dropdown for individual files. (Figure 103Figure 84).
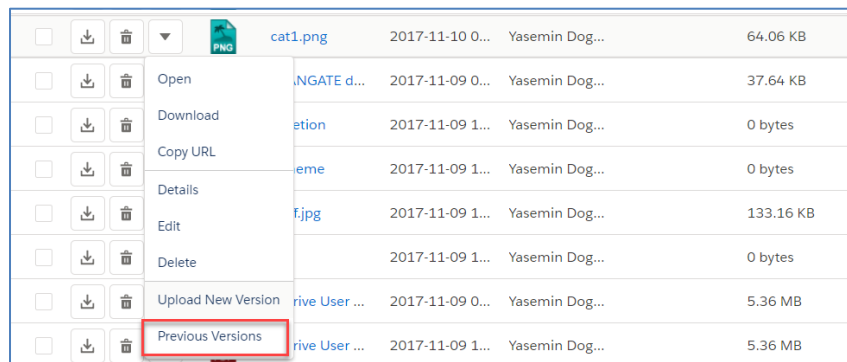

Figure 103

 "Set Current:" You can set a version as the latest version by clicking "Item Actions" button under "Actions" column and selecting "**Set Current**" action menu item from dropdown for individual files in Versions screen. When you click Set Current, selected old version will be set as the latest version of the file (Figure 104).
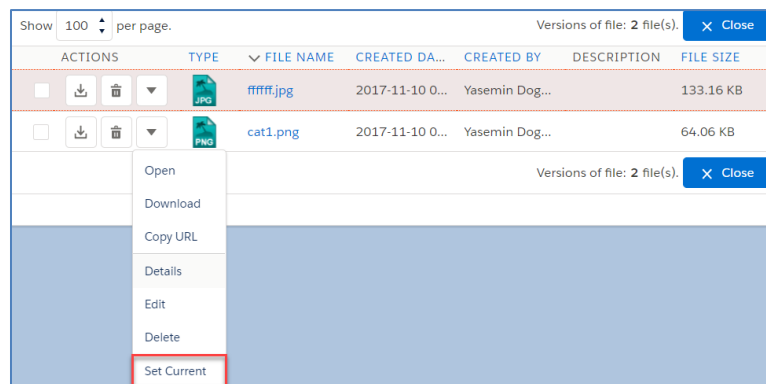

Figure 104

You will be able to apply Download, Open, Copy URL, Edit, Rename, Delete actions for individual version files also. These actions are same as the other item actions explained above.

(21) "Content Type Column" displays a type icon based on the content type of the opportunity file/folder (Figure 97-21).

(22)"File Name Column" shows the file name information for the opportunity files (Figure 97-22). You can sort files/folder ascending or descending by clicking the field header.

2. **"Customizable Field Columns"** are used to display customizable fields (Figure 97-23). Your Salesforce.com account's system administrator can change this customizable list using "S-Drive Configuration" page. If nothing is configured you'll see, "Created Date", "Created By", "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.

(1)

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 105). You need to delete object files first, and then you can delete the object.

Deletion problems
Test
Back to Previous Page

There are object files attached to this object. You need to first delete object files manually and then delete the object!
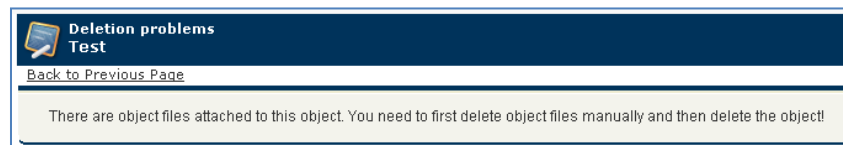
Figure 105

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".
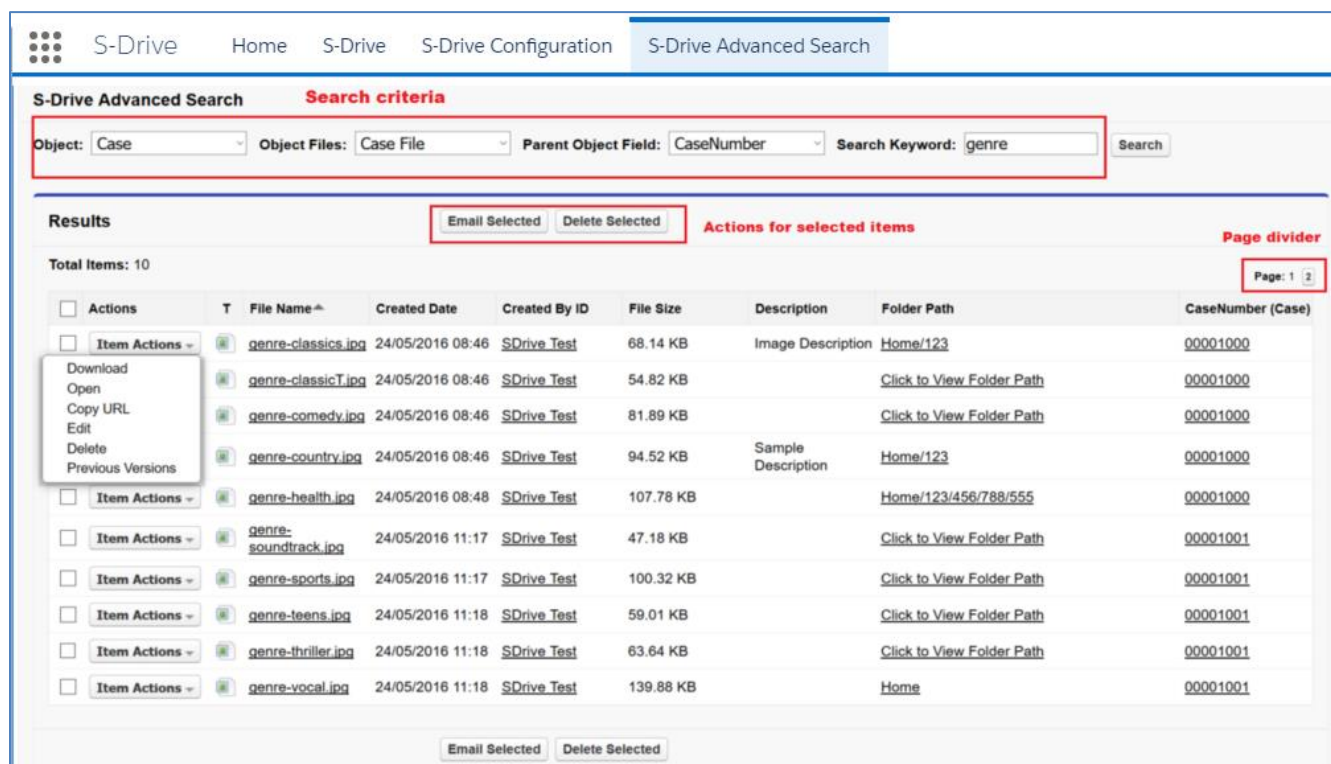
CyanGate

T. S-Drive Advanced Search

S-Drive Advanced Search is a new feature of S-Drive that helps to perform improved search functionality in object files. AdvancedSearchPage and AdvancedSearchComponent created for that. You can use AdvancedSearchComponent with your own VF pages. You can access to this feature using S-Drive Advanced Search tab.

1. Searching Files

S-Drive Advanced Search needs following criteria to perform a search;

- **Object:** This represents the S-Drive Object to select. Search will be performed on selected object. E.g. Account, Case.
- **Object File:** This represents the S-Drive Object File to select. Search will be performed on selected object file. E.g. Account File, Case File.
- **Parent Object Field (Optional):** This represents a field of selected parent S-Drive object. If you select a parent object field, you can see that in Results table. E.g. Case Number, Origin.
- **Search Keyword:** This represents the keyword to perform a search. Search will be performed in all fields of selected object file for entered keyword.

You can click on the "Search" button to perform a search. After a successful search, the results will be displayed on screen (Figure 106).

Figure 106

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Item Actions

1- Downloading Files

You can download a file by clicking **"Download"** item menu action under the "Item Actions" button (Figure 107).
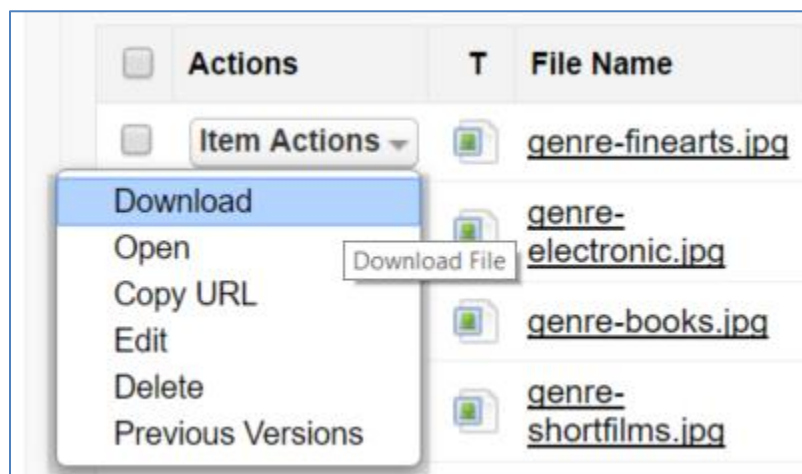
Figure 107

2- Opening Files

You can open a file by clicking **"Open"** item menu action under the "Item Actions" button (Figure 108).
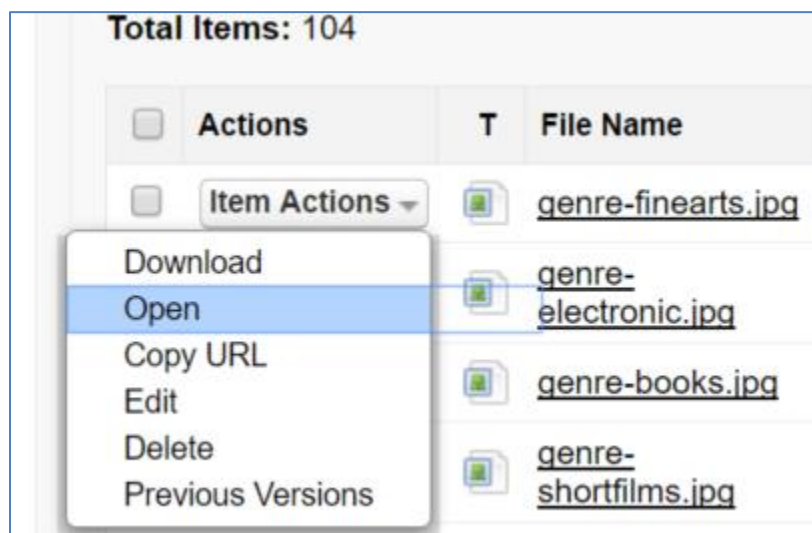
Figure 108

3- Copy URL

You can Copy URL of a file by clicking **"Copy URL"** item menu action under the "Item Actions"
button (Figure 109). After clicking Copy URL, you can select full URL and copy it (Figure 110).
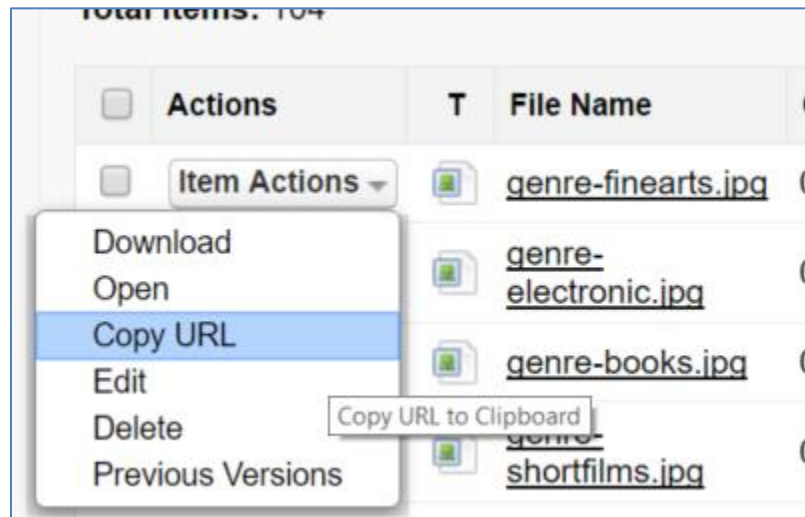
Figure 109
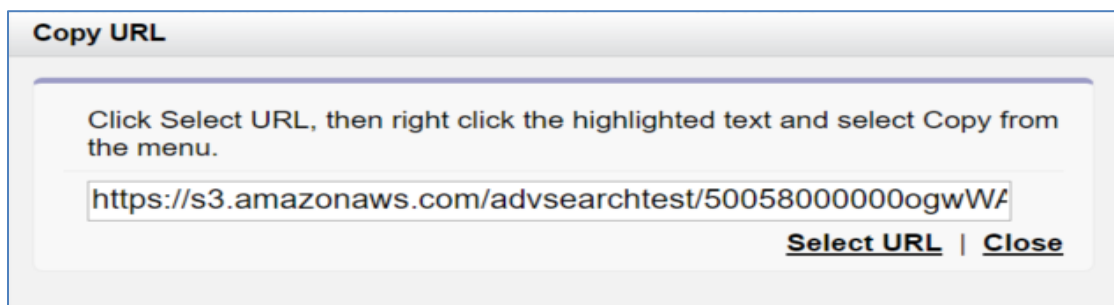
Figure 110

4- Editing Files

You can edit a file by clicking **"Edit"** item menu action under the "Item Actions" button (Figure
111). After clicking Edit, you can edit Description of file and save it. (Figure 112).
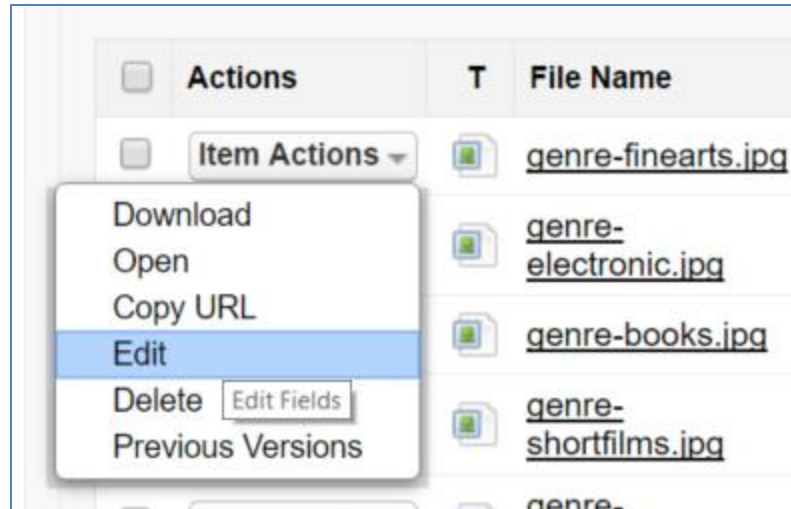
Figure 111

Figure 112

Notes
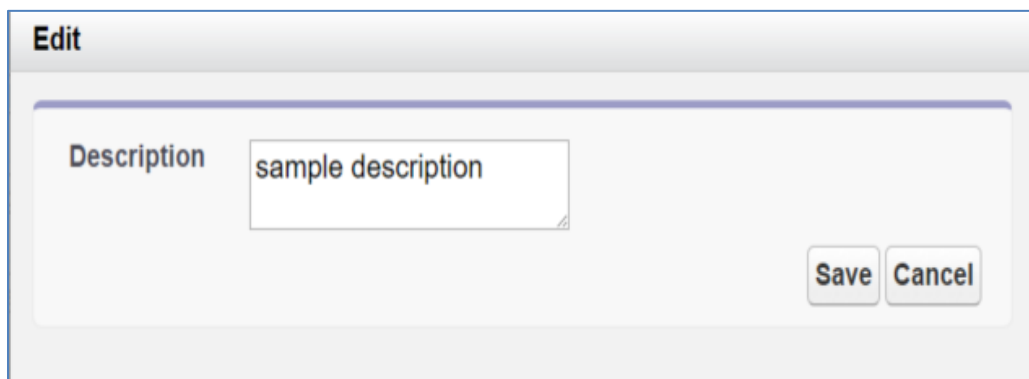
1. If versioning is enabled and if you are displaying previous versions, you can also edit version description for version files.

5- Deleting Files

You can delete a file by clicking **"Delete"** item menu action under the "Item Actions" button (Figure 113).
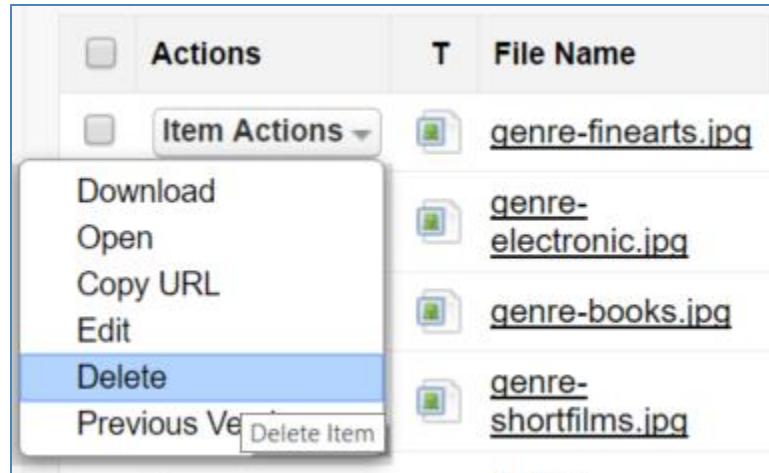
Figure 113

Notes

1. If versioning is enabled and if you delete latest version, all previous versions will also be deleted.

6- Previous Versions

You can display previous versions of files by clicking **"Previous Versions"** item menu action under the "Item Actions" button (Figure 114). After clicking on it, version history of the file will be listed (Figure 115).

Figure 114

Figure 115

You can also Download, Open, Copy URL, Edit and Delete version files.

Notes

1. You can edit Description and Version Description in "Previous Versions" screen. Also, if you delete Current Version on this screen, most recent file will be set as current.

Email Selected and Delete Selected

You can select one or multiple files by using checkboxes in results table and you can Email these files by clicking "Email Selected" button (Figure 116).

You can select one or multiple files by using checkboxes in results table and you can Delete these files by clicking "Delete Selected" button (Figure 116).

Figure 116

Navigation

You can display the Folder Path of a file by clicking on the "Click to View Folder Path" link and then you can click on the Folder Path to navigate to this folder in a new tab. You can also click on the Parent Object Field (E.g CaseNumber) to navigate to this parent record in a new tab (Figure 117). "Previous Versions" screen doesn't support "Folder Path" column.

Actions	T	File Name▲	Created Date	Created By ID	File Size	Description	Folder Path	CaseNumber (Case)
Item Actions ▾	🖼	genre-classics.jpg	24/05/2016 08:46	SDrive Test	68.14 KB	Image Description	Home/123	00001000
Item Actions ▾	🖼	genre-classicT.jpg	24/05/2016 08:46	SDrive Test	54.82 KB		Click to View Folder Path	00001000

Figure 117

2. Configuring S-Drive Advanced Search Component

S-Drive Advanced Search feature has been designed as dynamic and reusable. So, you can configure AdvancedSearchComponent. Below, you can see the attributes of AdvancedSearchComponent;

```
<apex:attribute name="searchCriteria" description="Criteria of the search." access="global"
type="String" required="required" assignTo="{!searchCriteriaAT}"/>

    <apex:attribute name="customObjectName" description="API Name of the custom object that the
files will belong to. This object can also be one of the standard objects such as Solutions or Products. For
example: 'MyObject__c' or 'Solution'" access="global" type="String" required="required"
assignTo="{!customObjectNameAT}"/>

    <apex:attribute name="customField" description="This represents a field of parent S-Drive object. If
you pass a parent object field, you can see this field in Results table. E.g. Case Number, Origin."
access="global" type="String" required="required" assignTo="{!customFieldAT}"/>

    <apex:attribute name="customObjectFileName" description="API Name of the custom object that will
represent the file. This custom file object is required to include fields indicated in the installation guide
of S-Drive. For example: 'MyFile__c'" access="global" type="String" required="required"
assignTo="{!customObjectFileNameAT}"/>

    <apex:attribute name="fileNamespacePrefix" description="Namespace prefix for the file object. This
attribute is required if the object has a namespace. For example: 'cg__'" access="global" type="String"
required="optional" assignTo="{!fileNamespacePrefixAT}" default=""/>

    <apex:attribute name="objectNamespacePrefix" description="Namespace prefix for the parent object
for the attachments. This attribute is required if the object has a namespace. For example: 'cg__'"
access="global" type="String" required="optional" assignTo="{!objectNamespacePrefixAT}" default=""/>

    <apex:attribute name="relationshipName" description="Master-detail relation used for selected
standard/custom object. For example: 'Parent__r'" access="global" type="String" required="required"
assignTo="{!relationshipNameAT}" default=""/>

    <apex:attribute name="orderBy" description="Name of the field that should be used to order the list
of files. This attribute is optional and leaving this empty will not order the results in any specific order.
For example: 'File_Name__c'" access="global" type="String" required="optional"
assignTo="{!orderByAT}" default=""/>

    <apex:attribute name="pageSize" description="Page size for pagination. Attachment items will be
paginated based on this value. This attribute is optional and default value is 100." access="global"
type="Integer" required="optional" assignTo="{!pageSizeAT}" default="100"/>

  </apex:component>
```

AdvancedSearchPage is used to pass customObjectName(Object), customObjectFileName(Object File), customField(Parent Object Field) and searchCriteria (Search Keyword) attributes into AdvancedSearchComponent using a user interface. You can embed AdvancedSearchComponent into a different VF Page, you can pass your info into component attributes.

Sample use of AdvancedSearchComponent in a VisualForce page;

```
<apex:page>

  <apex:form>

    <cg:AdvancedSearchComponent

            searchCriteria="genre"

            customField="Origin"

            customObjectName="Case"

            customObjectFileName="CaseFile__c"

            fileNamespacePrefix="cg__"

            objectNamespacePrefix="cg__"

            relationshipName="Case__r"

            orderBy="File_Name__c"

    />

  </apex:form>

</apex:page>
```

Sample Output (Figure 118);

Figure 118

U. 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 119)
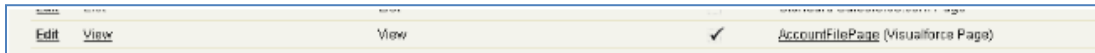
Figure 119

2. Upload a jpg image file into one of your accounts using Upload File(s) button. (Figure 120)

Figure 120

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 121)
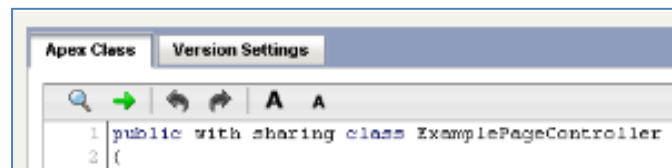
Figure 121

```
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 122)
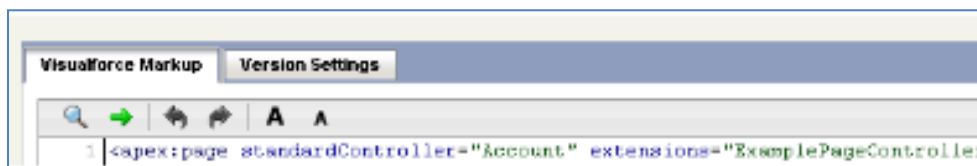
```
<apex:page standardController="Account" extensions="ExamplePageController">
        <apex:image url="{!fileURL}" />
</apex:page>
```

5. Customize your account page layout and include ExamplePage inside the layout. (Figure 123)
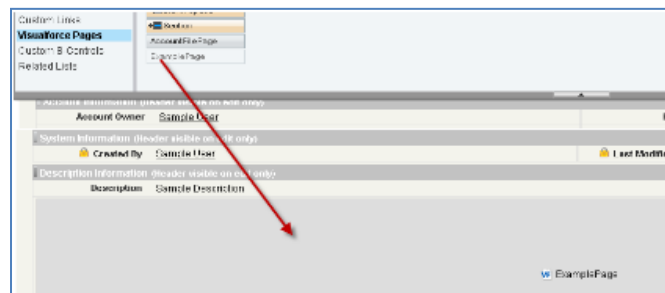
6. Now if you reload your account (which contains an image file) you'll see a screen like below. You can customize the apex class and page based on your needs. (Figure 124)

Figure 124

Notes

1. If you would like to get an old version of a file, you should add id of an old version file into fileoObjectIds list.

b. 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.

Notes

1. If you would like to get an old version of a file, you should add id of an old version file into fileoObjectIds list.

c. 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.

d. getAccessKey()

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

```
String getAccessKey()
```

e. getBucketName()

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

```
String getBucketName()
```

f. 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()
```

g. 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 126) 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**);

Notes

    1. If you enable versioning and add a latest version file id into wipIds list, all versions of that file will also be deleted. You can also delete a single old version file by adding its id into wipId list.

h. 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 125), which holds information about the files that are about to be uploaded.

The following steps are executed within this method:

> a. Validate the input with the following rules:
> 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.

1. Create the file record in Salesforce with work in progress state (WIP__c = true) (i.e. create S3Object, Case File, Custom Object File, etc).
2. 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 127 and Returns a list of UploadRequestInfo (Figure 125) 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 128.

i.   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 Result Object (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**);

j.   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**);

k. 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);

l. 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);

m. 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

1.	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)

n. 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**);

o. 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);

p. 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**);

q. 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 125

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 126

r. 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 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 127

a)   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.

b)   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 128).

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 128

s. getPreviewURL()

This method is used to get the URL of an S-Drive Attachment's Preview File.

```
String getPreviewURL(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.

timeValue: Expiration time of the link in seconds.

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

Notes

1. If you would like to get preview URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

t. getPreviewURLs()

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

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

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

List<String> getPreviewURLs(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 preview URLs of the S-Drive attachment.

![Notes icon] *Notes*

1. If you would like to get preview URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

S-DRIVE

CyanGate

u. getThumbnailURL()

This method is used to get the URL of an S-Drive Attachment's Thumbnail File.

```
String getThubmnailURL(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.

timeValue: Expiration time of the link in seconds.

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

Notes

1. If you would like to get thumbnail URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

v. getThumbnailURLs()

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

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

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

List<String> getThumbnailURLs(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 thumbnail URLs of the S-Drive attachment.

Notes

1. If you would like to get thumbnail URL of an old version of a file, you should add id of an old version file into fileoObjectIds list.

V. 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