

S-Drive Quick Reference Guide v2.1: Salesforce Lightning

1. 'S-Drive Folders' Tab

You can access S-Drive tab in lightning experience from **App Launcher > S-Drive App > S-Drive Tab**.

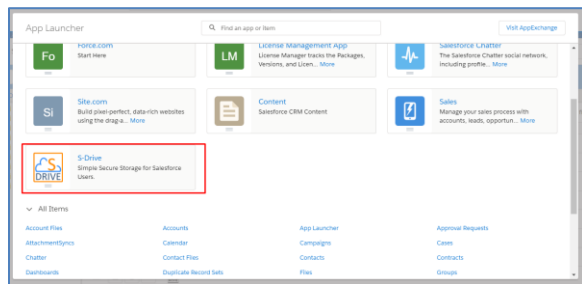


Figure 1

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

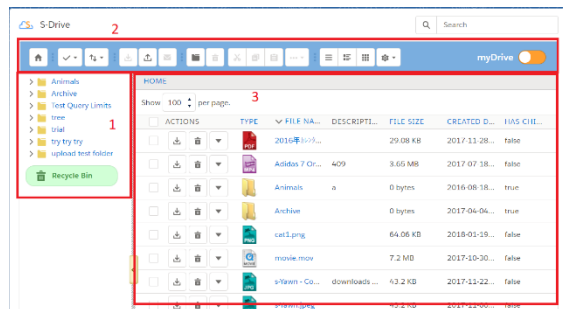


Figure 2

a. myDrive Folders

In order to switch to "myDrive" folders on the S-Drive Tab, use the toggle button on the right-hand side of the toolbar menu, under the search bar.



Figure 3

myDrive provides a new place to upload your files and create new folders that are only visible to you and no one else in your organization.

In myDrive, you can upload files, create folders, download or delete files and folders, and perform cut/copy/paste options, search for files in myDrive just as you do in S-Drive.

The main difference of myDrive is that this place is private only to you. Therefore, you will not find any sharing related actions, such as "Share", "E-mail" and "Chatter" in myDrive.

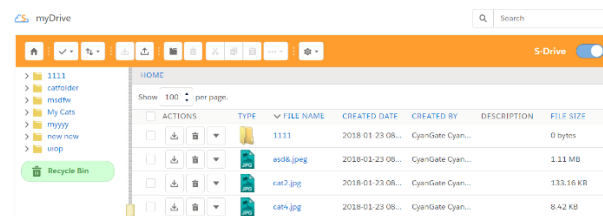



Figure 4

To go back to S-Drive files, you can use the toggle button.

Note: The sharing settings of myDrive folders may change depending on the settings on the object, if your admin has made changes for your organization. See "Lightning User Guide" for more information about myDrive folders.

b. Creating Folders

Click 'New Folder' button () from the toolbar. Type the folder name and then click 'OK' button to create a folder (Figure 5). Folder names cannot be blank, cannot start with a space or a dot and cannot contain characters such as '\', '/', ':', '*', '?', '"', '<', '>', '|'.

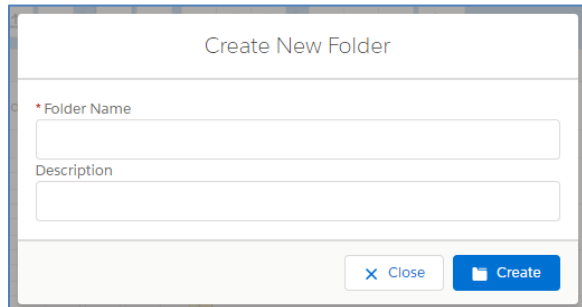







Figure 5

c. Uploading Files

Click 'Upload File(s)' button () from the toolbar. If not, it can be enabled via S-Drive Configuration page, "Enable download" configuration checkbox.

Select file(s) to upload by clicking 'Add file(s)' button (). Browse and select files by clicking 'Open' button to add files to the upload list. You can organize upload list using 'Add file(s)' () and 'Remove file(s)' () buttons. Click 'Upload file(s)' button () to start uploading selected files. Upload progress will be displayed in the 'Upload Progress Bar'. Status of the uploaded file will be updated to 'COMPLETED' (Figure 6).

Note that Java and Flash upload managers have been deprecated in since v1.28.

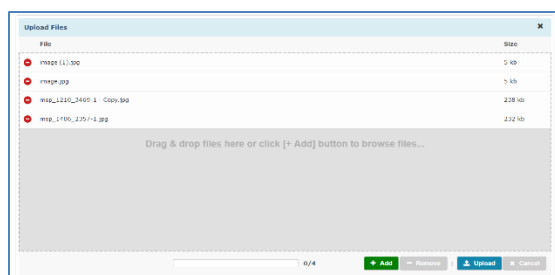



Figure 6

d. Uploading New Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can upload new version of file by clicking "Item Actions" menu button () under "Actions" column and selecting "Upload New Version" action menu (Figure 7). Only HTML Upload Manager supports version upload.

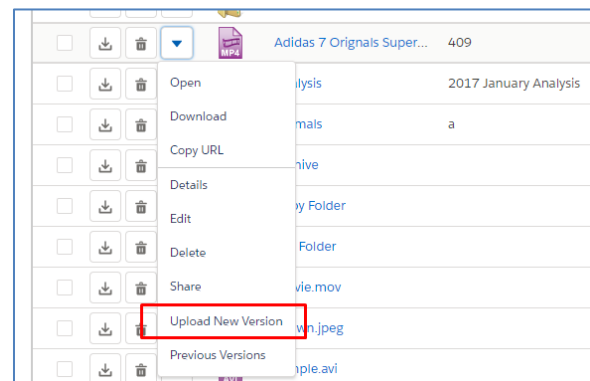


Figure 7

e. Previous Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can see previous versions of a file by clicking "Item Actions" button under "Actions" column and selecting "Previous Versions" action menu item from dropdown. (Figure 8).

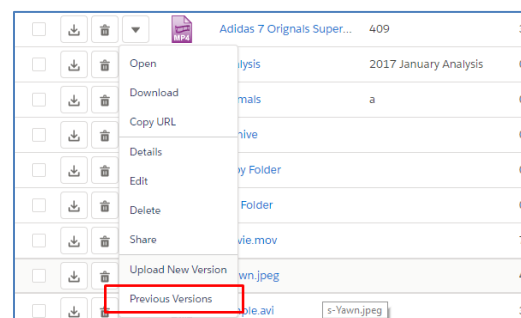


Figure 8

You can set a version of a file as current version by clicking "Item Actions" button under "Actions" column and selecting "Set Current" action menu item from dropdown. (Figure 9)

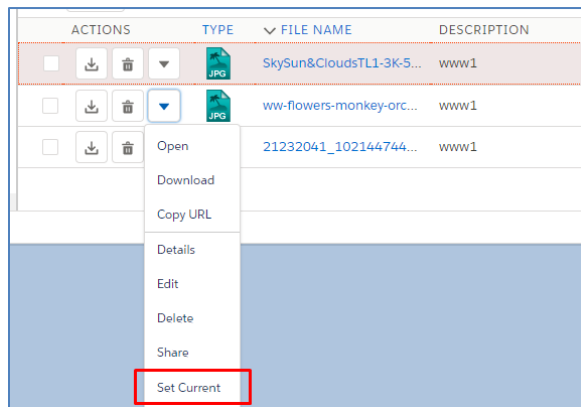


Figure 9

f. Attaching Files from S-Drive Folders

Click 'Attach from S-Drive Folders' button to attach files from 'S-Drive Folders' (**Error! Reference source not found.**). This will bring the 'S-Drive Folders' screen with two additional buttons: 'Attach File(s)' and 'Cancel Attach' (**Error! Reference source not found.**). Once the 'S-Drive Folders' screen is opened you can select files and click 'Attach File(s)' button to attach selected files to the selected object as attachments. Attaching is a copy process, so, copy of the attached file will be created for the selected object. Only current file will be attached if you have versions under the file.

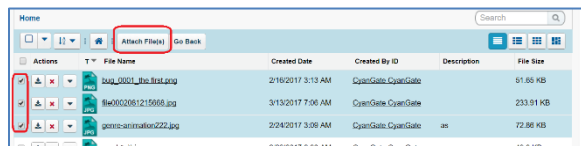




Figure 10

g. Emailing Files

Select file(s) and then click 'Send Email' button () to email files. You can type a contact name into 'To' address or you can select it searching over your contacts by clicking 'Lookup' button. You can select or type 'Additional To', 'CC', and 'BCC' fields using appropriate fields and buttons. 'Attachment Expiration' is used to set the expiration time for the attached files. Default is 'Never Expires'. If you uncheck 'Never Expires', other options will appear. For example, if you select 30 minutes for the attachment expiration, recipients of the email will not be able to download the attached files after 30 minutes of sending the email. You can display and hide attachment details using 'Details' buttons. You can remove individual attachments from email by clicking () icon next to the file name in the 'Details' section. Type your email's subject and message body or select a preconfigured template using "Select Template" button, then click 'Send' button to send the email (Figure 11). You'll get success message if mail is sent correctly. Note that you cannot email folders.

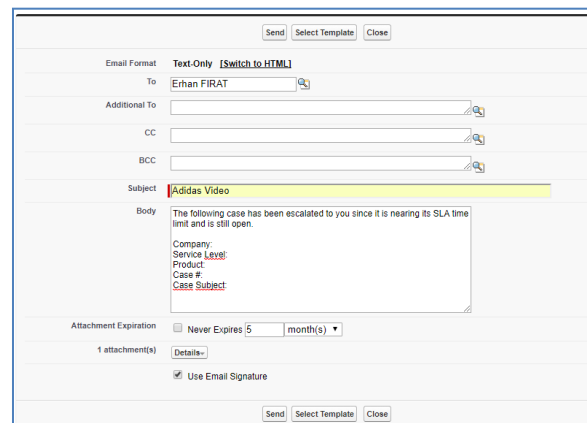




Figure 11

h. Deleting Files/Folders

Select files/folders and then click 'Delete File(s)' button () to delete files or folders. You can delete files/folders one-by-one using 'Delete' action menu item from the Actions column of the selected file/folder or quick access delete button on action column ()

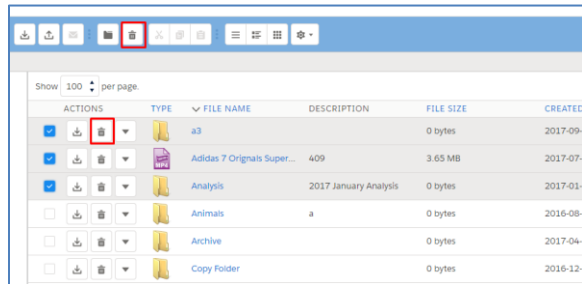


Figure 12

When you delete your files/folders they will be sent to “Recycle Bin”. You can access recycled files/folders by clicking on the “Recycle Bin” button which is at the bottom of the Folder’s Tree (Figure 13).

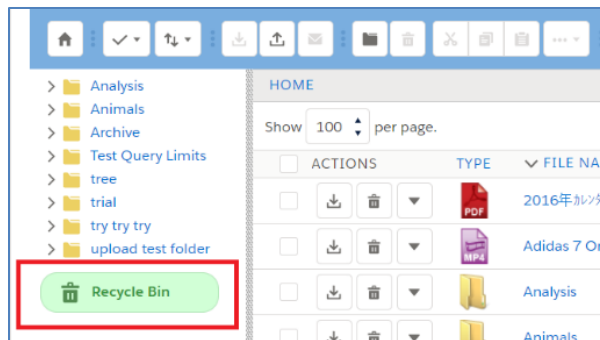


Figure 13

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 14).

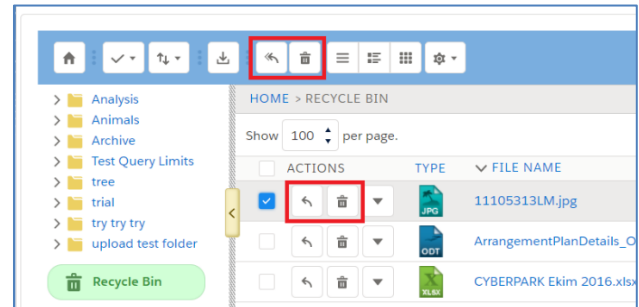


Figure 14

You’ll be asked ‘Are you sure?’ after clicking ‘Delete’ button. Select ‘Yes’ option to delete files/folders. On Lightning Experience, you can also delete folders that contain files or subfolders within Salesforce Query Limits.

If you have versions under the current file, all versions of this file will also be deleted.

When you recover files/folders they will be sent back to where they were located before deletion. See “S-Drive Lightning User Guide – Deleting Files/Folders” section for more information about deleting files and folders.

i. Downloading Files

To download a single file with one click, select a file and then click ‘Download’ action menu item from the Actions column of the selected file or quick download button on Actions column. Note that on lightning component, you can also download folders with sub files & folders.

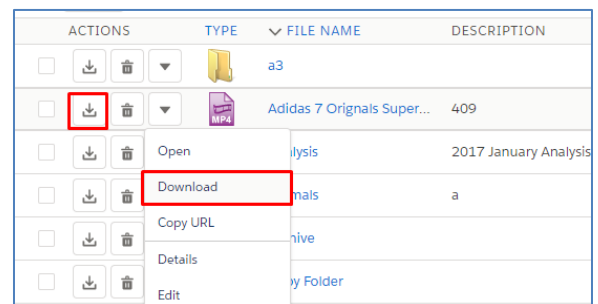


Figure 15

To download multiple files using 'Zip & Download', select files or folders and then click 'Download File(s)' button (Figure 16). "Zip & Download" screen will be opened, and downloads will start.

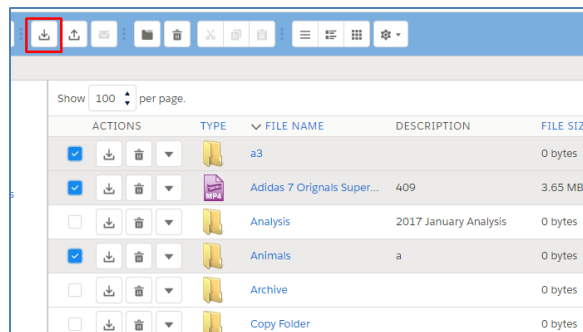






Figure 16

j. Copying and Moving Files

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

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

If sharing is enabled it will ask if you want to bring the current shares with the cut/copied item. Progress window will be displayed and files will be copied or moved to the target folder (Figure 17). Note that copy/move operations are not allowed on folders.

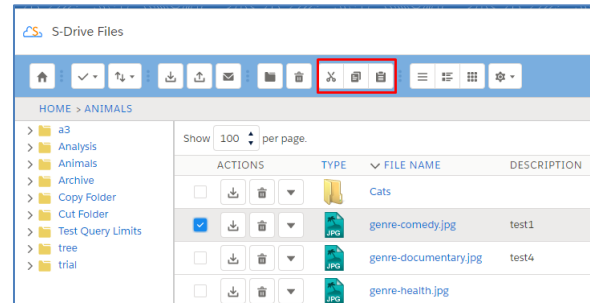


Figure 17

k. Editing File/Folder Description

Click the "Actions" menu of file or folder you want to edit files' name, description and all custom fields that are editable and active on the view. When "Save" button clicked, it directed to Detail view. (Figure 18).

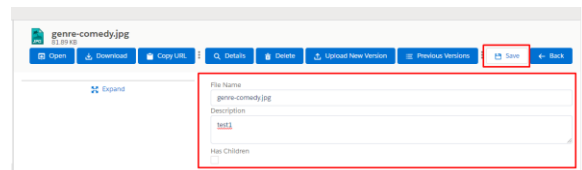


Figure 18

l. Copying URL to Clipboard

For copying URL of a file to clipboard, click the "Actions" menu of the file then select 'Copy URL' from the list. Follow the on-screen instructions and copy the URL (Figure 19). Now you can paste the URL.

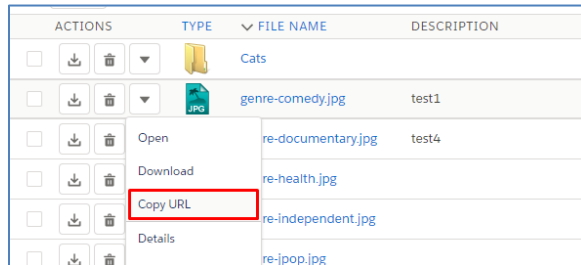


Figure 19

m. Sharing Files & Folders

You can list shares on the file, add new shares for files and folders to users/groups/roles etc., edit/delete current shares using "Share" item menu action of the "Actions" menu (Figure 20). See "S-Drive User Guide" for detailed information.

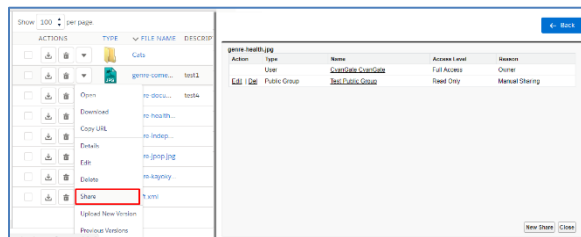


Figure 20



n. Searching S-Drive Folders


You can search for files and folders inside S-Drive Folders (Figure 21).

To start a search, type the search criteria to the right corner of S-Drive Folders screen, into the search box and click Enter. You can use wildcards, '*' (multiple characters), '?' (single character)' in search keywords. For example: *genre**, *boo?* etc.

When you perform a search in S-Drive folders, the search will also be made for myDrive folders.

The results for both will be displayed in the same section with a 'Search results: XX file(s). S-Drive: X myDrive: X' header. 'New Folder', 'Upload File(s)', 'Paste' buttons are invisible in the search

results screen. You can go back to previous screen using () button on top right, or you can go to home folder by clicking 'Home' link on the breadcrumb panel or Home button () on toolbar.

To navigate to the search results for myDrive folders, you can click on myDrive button (). When clicked it will redirect you to myDrive folders.

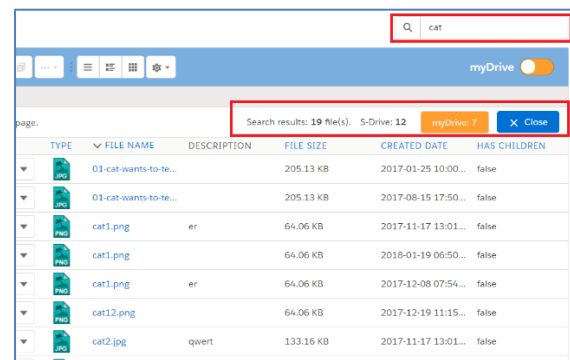


Figure 21

o. Switching Between View Types

S-Drive Lightning has three different view types. List, Thumbnail and Grid. If 'Preview and Thumbnail' feature is enabled for S-Drive Folders (S3Object), you can switch between view types (Figure 22). See S-Drive Advanced Configuration Guide for 'Preview and Thumbnail' configuration.

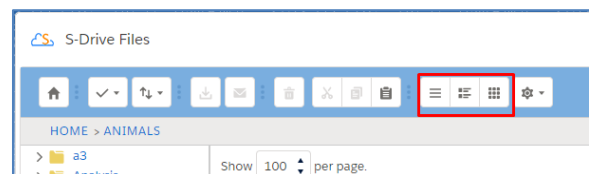



Figure 22

You can display thumbnail of your files in list format using Thumbnail View button () (Figure 23).

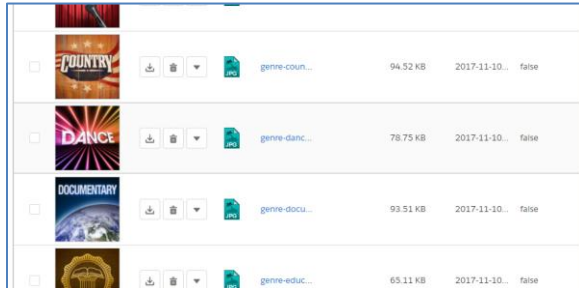


Figure 23



You can display thumbnail of your files in grid format using *Grid View* button () (Figure 24).



Figure 24

You can hide thumbnail of your files in list view using *List View* button () (Figure 25).





















Show	100	per page.		
ACTIONS	TYPE	FILE NAME	DESCRIPTION	FILE SIZE
<input type="checkbox"/>   		genre-comedy.jpg	test1	81.89 KB
<input type="checkbox"/>   		genre-documen...	test4	93.51 KB
<input type="checkbox"/>   		genre-health.jpg		107.78 KB
<input type="checkbox"/>   		genre-independ...		82.89 KB
<input type="checkbox"/>   		genre-jpop.jpg		67.49 KB
<input type="checkbox"/>		genre-kayokyok...		58.86 KB

Figure 25

p. Posting S-Drive Files to Chatter

You can make comments on different files you have on your S-Drive files. For this purpose you can use the “Post to Chatter” functionality. Click on Item Actions Menu of a file and click on “Post to Chatter” (Figure 26).

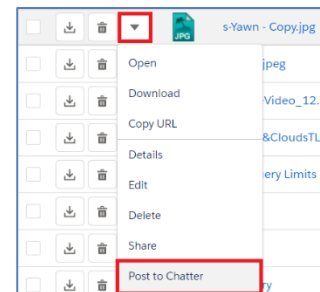


Figure 26

Choosing this option will open a pop-up dialogue where you can share your thoughts on these files with Salesforce’s Chatter.

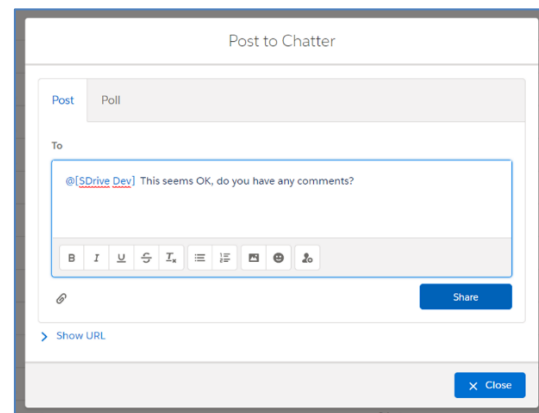


Figure 27

In this pop-up page, you can either post your thoughts, or create a poll and mention users who have access to this file. See the URL of the file in this pop-up box, by clicking on the “Show URL” button on the bottom left side.

You can reach the Chatter posts about the file from the “Detail” page of the file, by clicking on the “Chatter” tab (Figure 28-1). In this page you can also share posts (Figure 28-2).

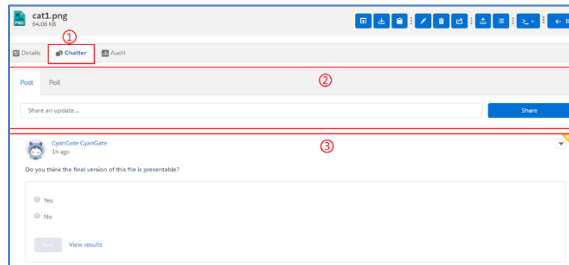


Figure 28

Here you can reach the Chatter Feed and view the posts and comments about the file.

2. S-Drive Attachment Lightning Component

You can access S-Drive component in lightning experience record page of an object (Account, Case, or My Custom Object). To get more information please check *S-Drive Advanced Configuration Guide*.

'S-Drive' component has three main panels: *Folders* panel (Figure 29-1) displays folder structure. *Toolbar* panel (Figure 29-2) includes buttons required for *creating folders; uploading, downloading, emailing, deleting, copying, and moving files and a search box*. *Current Folder View / Search Results View* (Figure 29-3) displays all files and subfolders inside the selected folder or based on a search accordingly. *Actions* column in the current folder view has file and folder basis actions like *Download, Share, Rename, Edit Description, Copy URL to Clipboard, and Delete*.

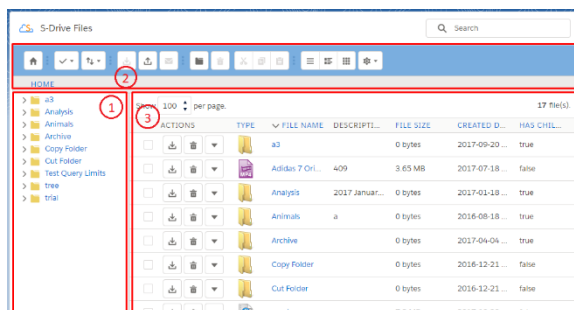



Figure 29

a. Creating Folders

Click 'New Folder' button () from the toolbar. Type the folder name and then click 'OK' button to create a folder (Figure 30). Folder names cannot be blank, cannot start with a space or a dot and cannot contain '\', '/', ':', '*', '?', '"', '<', '>', '|' characters.

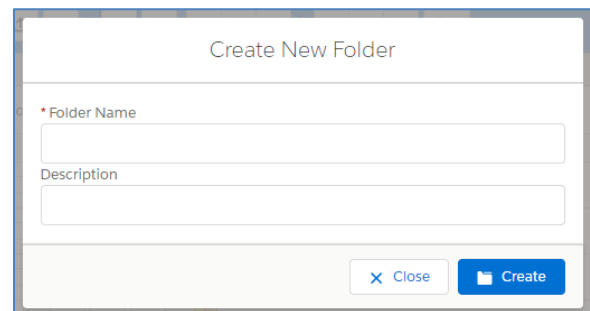







Figure 30

b. Uploading Files

Click 'Upload File(s)' button () from the toolbar. If not, it can be enabled via S-Drive Configuration page, "Enable download" configuration checkbox.

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

Note that Java and Flash upload managers has been deprecated in since v1.28.

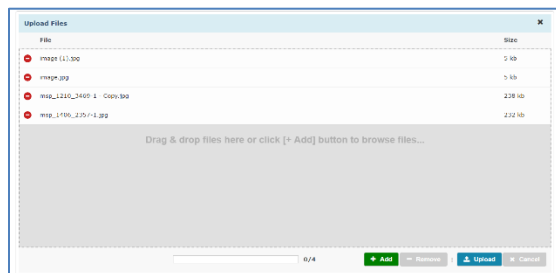



Figure 31

c. Uploading New Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can upload new version of file by clicking

"Actions" menu button () under "Actions" column and selecting "Upload New Version" action menu (Figure 32). Only HTML Upload Manager supports version upload.

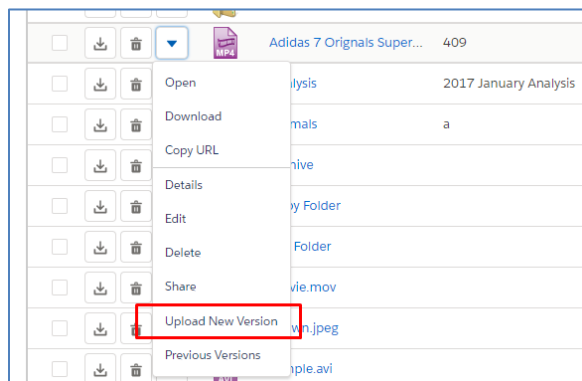


Figure 32

d. Previous Versions of a File

[This feature requires enabling versioning on the organization. Refer to the S-Drive Installation Guide to enable Versioning for your organization.] You can see previous versions of a file by clicking "Item Actions" button under "Actions" column and

selecting "Previous Versions" action menu item from dropdown. (Figure 33).

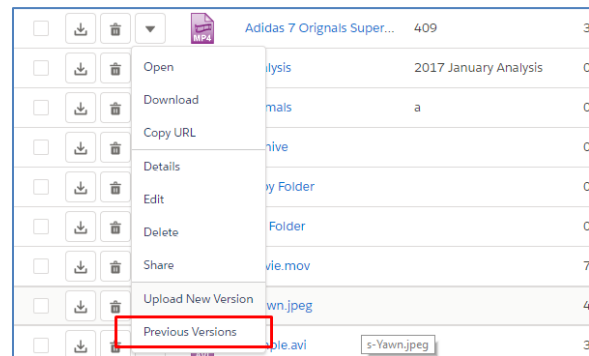


Figure 33

You can set a previous version of file as current version by clicking "Actions" button under "Actions" column and selecting "Set Current" action menu item from dropdown. (Figure 34)

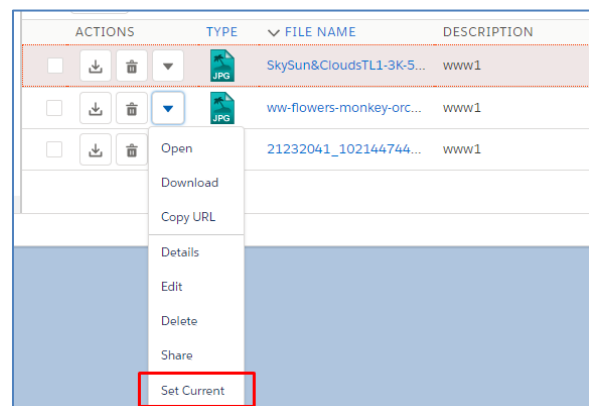



Figure 34

e. Emailing Files

Select file(s) and then click 'Send Email' button () to email files. You can type a contact name into 'To' address or you can select it searching over your contacts by clicking 'Lookup' button. You can select or type 'Additional To', 'CC', and 'BCC' fields using appropriate fields and buttons. 'Attachment Expiration' is used to set the expiration time for the attached files. Default is 'Never

Expires'. If you uncheck 'Never Expires', other options will appear. For example, if you select 30 minutes for the attachment expiration, recipients of the email will not be able to download the attached files after 30 minutes of sending the email. You can display and hide attachment details using 'Details' buttons. You can remove individual attachments from email by clicking (🗑️) icon next to the file name in the 'Details' section. Type your email's subject and message body or select a preconfigured template using "Select Template" button, then click 'Send' button to send the email (Figure 35). You'll get success message if mail is sent correctly. Note that you cannot email folders.

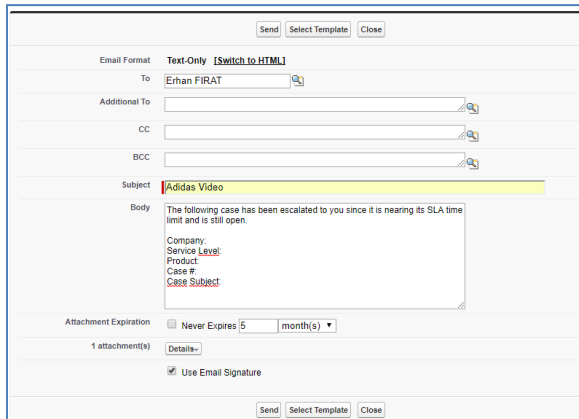
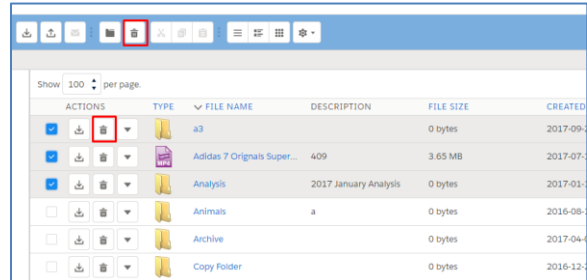


Figure 35

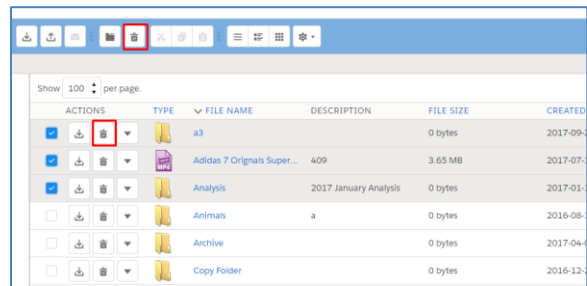
f. Deleting Files/Folders

Select files/folders and then click 'Delete File(s)' button (🗑️) to delete files or folders. You can delete files/folders one-by-one using 'Delete' action menu item from the Actions column of the selected file/folder or quick access delete button on action column (🗑️).



ACTIONS	TYPE	FILE NAME	DESCRIPTION	FILE SIZE	CREATED
🗑️	Folder	a3		0 bytes	2017-09-01
🗑️	File	Adidas 7 Originals Super...	409	3.65 MB	2017-07-01
🗑️	File	Analysis	2017 January Analysis	0 bytes	2017-01-01
🗑️	Folder	Animals	a	0 bytes	2016-08-01
🗑️	Folder	Archive		0 bytes	2017-04-01
🗑️	Folder	Copy Folder		0 bytes	2016-12-01

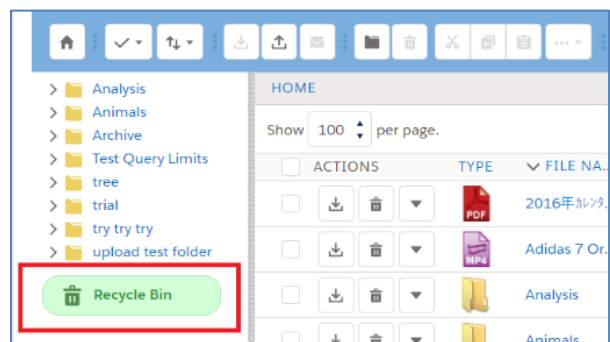
Figure 36



ACTIONS	TYPE	FILE NAME	DESCRIPTION	FILE SIZE	CREATED
🗑️	Folder	a3		0 bytes	2017-09-01
🗑️	File	Adidas 7 Originals Super...	409	3.65 MB	2017-07-01
🗑️	File	Analysis	2017 January Analysis	0 bytes	2017-01-01
🗑️	Folder	Animals	a	0 bytes	2016-08-01
🗑️	Folder	Archive		0 bytes	2017-04-01
🗑️	Folder	Copy Folder		0 bytes	2016-12-01

Figure 37

When you delete your files/folders they will be sent to "Recycle Bin". You can access recycled files/folders by clicking on the "Recycle Bin" button which is at the bottom of the Folder's Tree (Figure 38).



HOME
<ul style="list-style-type: none"> > Analysis > Animals > Archive > Test Query Limits > tree > trial > try try try > upload test folder
<div>Recycle Bin</div>

Figure 38

When you navigate to Recycle Bin, you will see the list of files and folders you have deleted. You can recover or delete the

files/folders in Recycle Bin. You can choose multiple items to delete or recover at once. For these purposes you can use the Toolbar menu buttons or the Actions menu (Figure 39).

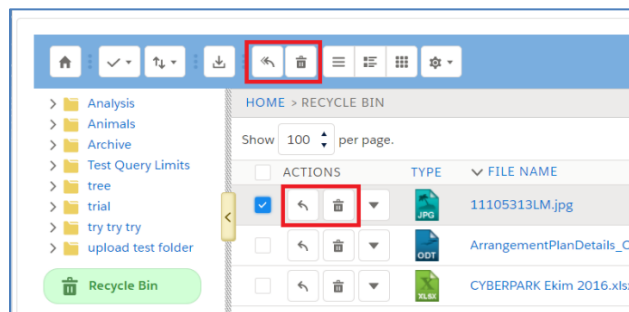


Figure 39

You'll be asked 'Are you sure?' after clicking 'Delete' button. Select 'Yes' option to delete files/folders. On Lightning Experience, you can also delete folders that contain files or subfolders within Salesforce Query Limits. If you have versions under the current file, all versions of this file will also be deleted.

When you recover files/folders they will be sent back to where they were located before deletion. See "S-Drive Lightning User Guide – Deleting Files/Folders" section for more information about deleting files and folders.

g. Downloading Files

To download a single file with one click, select a file and then click 'Download' action menu item from the Actions column of the selected file or quick download button on Actions column (Figure 40). Note that on lightning component, you can also download folders with sub files & folders.

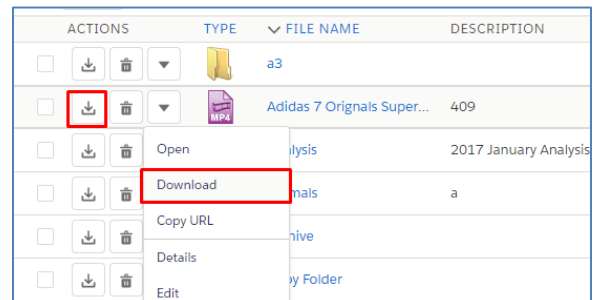


Figure 40

To download multiple files using 'Zip & Download', select files or folders and then click 'Download File(s)' button (Figure 41). "Zip & Download" screen will be opened and downloads will start.

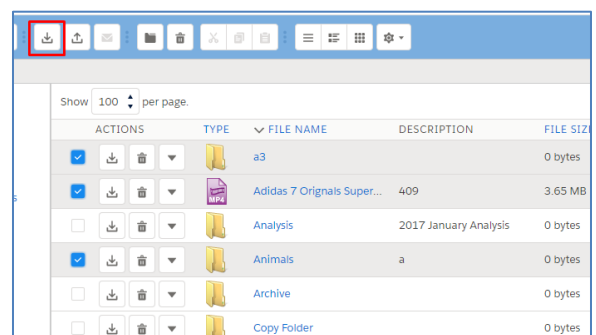






Figure 41

h. Copying and Moving Files

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

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

If sharing is enabled it will ask if you want to bring the current shares with the cut/copied item. Progress window will be displayed, and files will be copied or moved to the target folder

(Figure 42). Note that copy/move operations are not allowed on folders.

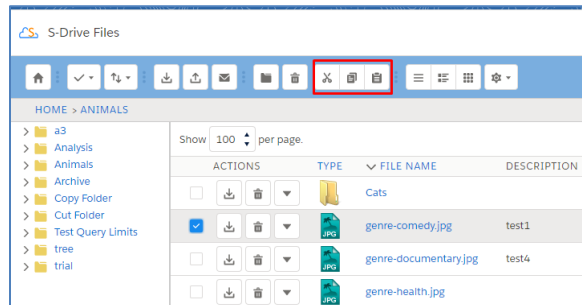


Figure 42

i. Editing File/Folder Description

Click the "Actions" menu of file or folder you want to edit files' name, description and all custom fields that are editable and active on the view. When "Save" button clicked, it directed to Detail view. (Figure 43).

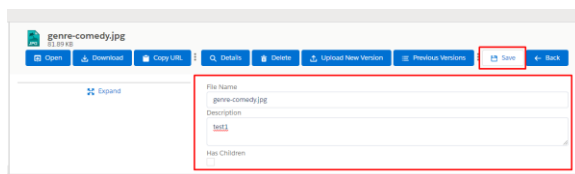


Figure 43

j. Copying URL to Clipboard

For copying URL of a file to clipboard, click the "Actions" menu of the file then select 'Copy URL' from the list. Follow the on-screen instructions and copy the URL (Figure 44). Now you can paste the URL.

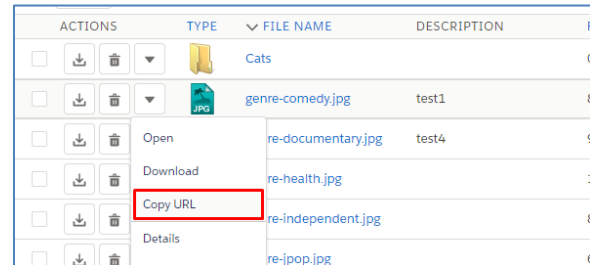


Figure 44

k. Searching in Attachment Files

You can search for files and folders inside S-Drive Folders (Figure 45).

To start a search, type the search criteria to the right corner of S-Drive Attachment component screen, into the search box and click Enter. You can use wildcards, '*' (multiple characters), '?' (single character)' in search keywords. For example: *genre**, *boo?* etc.

Results are displayed in the same section with a 'Search results: XX file(s)' header. 'New Folder', 'Upload File(s)', 'Paste' buttons are invisible in the search results screen. You can go back to previous screen using (Close) button on top right, or you can go to home folder by clicking 'Home' link on the breadcrumb panel or Home button (Home icon) on toolbar.

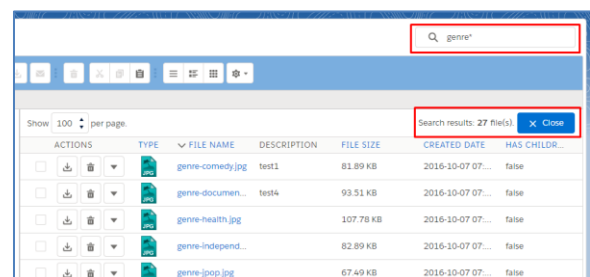


Figure 45

l. Switching Between View Types

S-Drive Attachment component has three different view types. List, Thumbnail and Grid. If 'Preview and Thumbnail' feature is enabled for related object (i.e. AccountFile, CaseFile, or MyCustomObjectFile), you can switch between view types (Figure 46). See S-Drive Advanced Configuration Guide for 'Preview and Thumbnail' configuration.

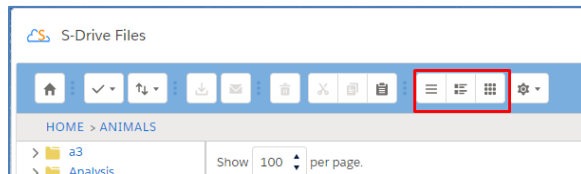



Figure 46

You can display thumbnail of your files using *Thumbnail View* button () (Figure 47).

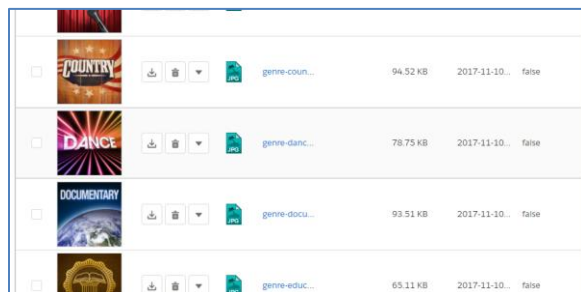


Figure 47



You can display your files in grid format using *Grid View* button () (Figure 48).



Figure 48

You can hide thumbnail of your files using *List View* button () (Figure 49).

























Show	100	per page.		
ACTIONS	TYPE	FILE NAME	DESCRIPTION	FILE SIZE
<input type="checkbox"/>   		genre-comedy.jpg	test1	81.89 KB
<input type="checkbox"/>   		genre-documen...	test4	93.51 KB
<input type="checkbox"/>   		genre-health.jpg		107.78 KB
<input type="checkbox"/>   		genre-independ...		82.89 KB
<input type="checkbox"/>   		genre-jpop.jpg		67.49 KB
<input type="checkbox"/>   		genre-kayokyok...		58.86 KB

Figure 49

m. Posting Attachment Files to Chatter

You can make comments on different files you have on your attachment files. For this purpose, you can use the "Post to Chatter" functionality. Click on Item Actions Menu of a file and click on "Post to Chatter" (Figure 50).

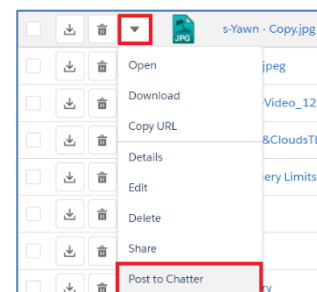


Figure 50

Choosing this option will open a pop-up dialogue where you can share your thoughts on these files with Salesforce's Chatter.

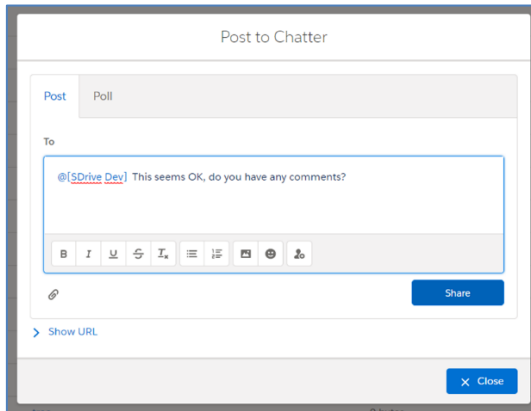


Figure 51

In this pop-up page, you can either post your thoughts, or create a poll and mention users who have access to this file. See the URL of the file in this pop-up box, by clicking on the “Show URL” button on the bottom left side.

You can reach the Chatter posts about the file from the “Detail” page of the file, by clicking on the “Chatter” tab (Figure 52-1). In this page you can also share posts (Figure 52-2).

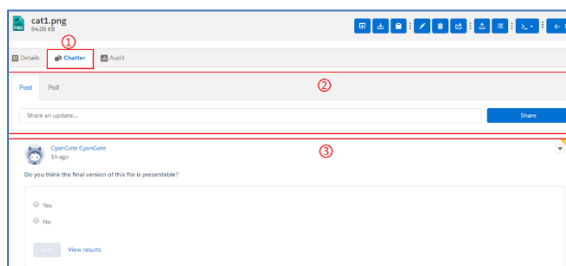


Figure 52

Here you can reach the Chatter Feed and view the posts and comments about the file.

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