Using S-Drive with Case Feeds

This document explains how to use Case Feeds with S-Drive.

In order to use Case Feeds with S-Drive on the Salesforce.com platform, there are certain setup tasks that involve:

1. Creation of an extension (CaseFilePortalUserExtension).
2. Creation of a custom page (CaseFeedCaseFilePage).
3. Removing current Case Page overrides.
4. Overriding the View of Case with new custom page.

Creation of CaseFilePortalUserExtension

We need to create CaseFilePortalUserExtension to distinguish portal profiles, case feed disabled profiles and case feed enabled profiles. Currently, Salesforce does not provide a way to get Case Feed disabled profiles, so we need to filter these profiles manually inside this extension while filtering the customer portal profiles.

Figure 1 CaseFilePortalUserExtension Code

Click **Setup -> App Setup -> Develop -> Apex Classes** and click "**New**" button to create a new class. Paste the following code inside the new class and click "**Save**" button:

```
public class CaseFilePortalUserExtension
{
  public Boolean isUserPortalUser{get; set;}
  public Boolean isUserProfileCaseFeedNotEnabled{get;set;}

  public CaseFilePortalUserExtension(ApexPages.StandardController stdController) {
    User u = [SELECT Id,Profile.UserType, Profile.Name FROM User WHERE Id = :UserInfo.getUserId()];
    isUserPortalUser = (u.Profile.UserType == 'CSPLitePortal' || u.Profile.UserType == 'CustomerSuccess'
      || u.Profile.UserType == 'PowerCustomerSuccess' );
    isUserProfileCaseFeedNotEnabled = (u.Profile.Name == 'System Administrator');
  }
}
```

You need to add the profile names that does not have case feed enabled next to the above code in bold (e.g. u.Profile.Name == 'System Administrator' || u.Profile.Name == 'Another Profile').

Otherwise users with these profiles get "Insufficient Privileges" error when they try to load the Case page.

Creation of CaseFeedCaseFilePage

Now we need to create the custom page to override the standard case page layout.

Click **Setup -> App Setup -> Develop -> Pages** and click "**New**" button to create a new custom page. Type the name and label as "**CaseFeedCaseFilePage**". Paste the following code inside the new page and click "**Save**" button:

```
<apex:page standardController="Case" extensions="cg.CaseEmailExtension,CaseFilePortalUserExtension" tabStyle="Case">
 <support:caseFeed caseId="{!Case.Id}" rendered="{!NOT(isUserPortalUser) && NOT(isUserProfileCaseFeedNotEnabled)}">
 </support:caseFeed>
 <apex:detail inlineEdit="true" relatedList="true" showChatter="true"
    rendered="{!isUserPortalUser || isUserProfileCaseFeedNotEnabled}"/>
 <cg:AttachmentComponent title="Case Files"
  customObjectName="Case" customObjectFileName="CaseFile__c"
  fileNamespacePrefix="cg__"
  relationshipName="Case__r"
  legacyIdSupport="true"
  objectId="{!Case.Id}"
  privateEnabled="true"
  inline="true"
  defaultEmailAddress="{!defaultCaseEmail}" />
</apex:page>
```
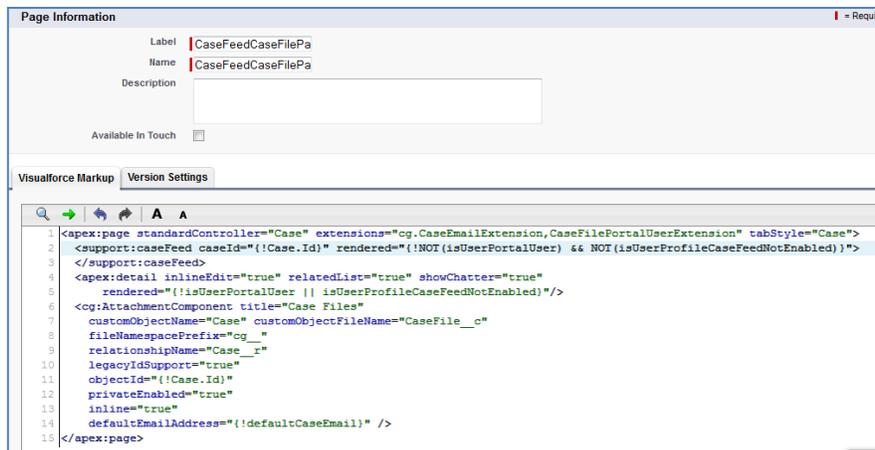
Figure 2 CaseFeedCaseFilePage

Removing Current Case Page Overrides

If there are any page layout overrides remove them by following these steps:
1. Click **Setup -> App Setup -> Customize -> Cases -> Page Layouts** and select the page layout that has old S-Drive overrides (e.g. Case Layout).
2. Find the page element that is similar to following figure and remove the related page section by clicking the - (minus) sign on the top-right corner of the section.
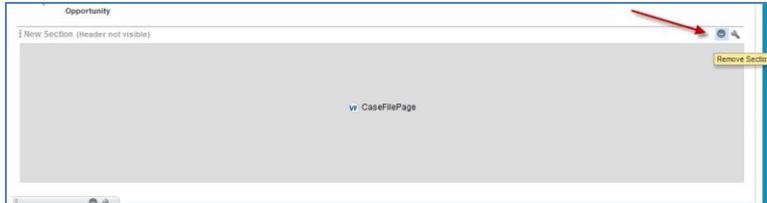3. Click Save and close the layout editing screen.

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Figure 3 Remove Layout Item

Overriding the View of Case with New Custom Page

For the last step we need to override the "View" of the case.

Follow these steps:
1. Click **Setup -> App Setup -> Customize -> Cases -> Buttons, Links and Actions** and click to the "**Edit**" button next to the "**View**" label under "**Standard Buttons and Links**" section.
2. Select "**Override With**" as "**Visualforce Page**" checkbox and select "**CaseFeedCaseFilePage**" from the dropdown.
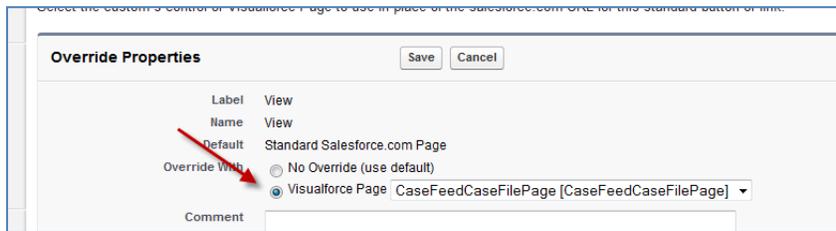3. Click "**Save**" button.

Figure 4 Override View

Now users with "Case Feed" enabled profiles will see "S-Drive Attachments" section under individual cases. Customer Portal users and configured "case feed disabled profile users" will not see the "Case Feed" section but the S-Drive Attachments.
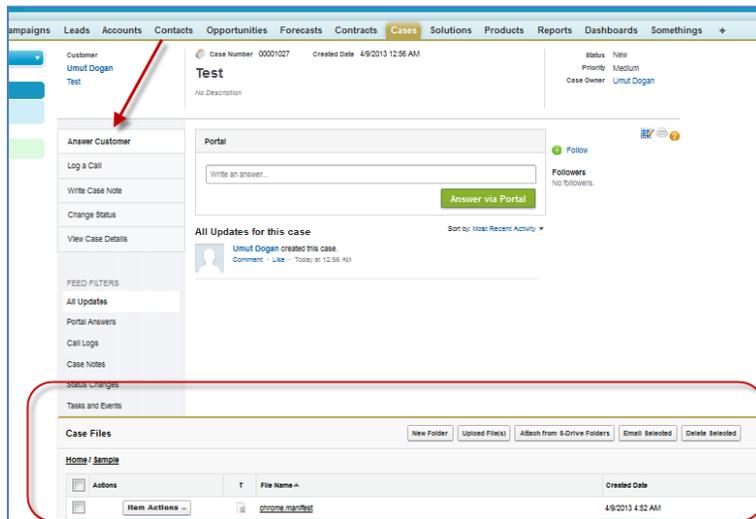

Figure 5 Case Feeds Enabled

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