

S-Drive Quick Reference Guide v1.17

1. 'S-Drive Folders' Tab

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

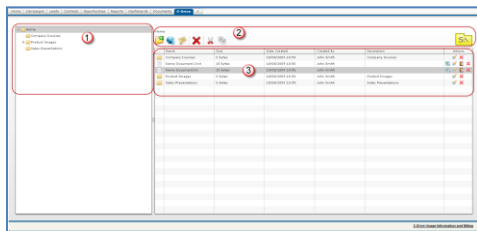


Figure 1

a. Creating Folders

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



Figure 2

b. Uploading Files

Click 'Upload File(s)' button (📁) from the toolbar. 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 3).

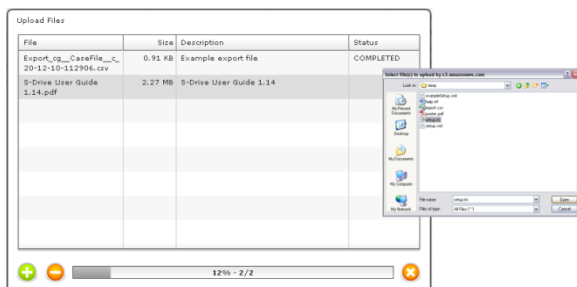


Figure 3

c. Emailing Files

Select file(s) and then click 'Send Email' button (✉️) to email files. You cannot type 'To' address, you need to select it searching over your contacts by clicking 'To...' 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 (Figure 5). 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 'Attachment Details' buttons (▶️, ◀️). You can remove individual attachments from email by clicking 'Remove' button (✖️) in the 'Attachment Details' section. Type your email's subject and message body, then click 'Send' button to send the email (Figure 4). You'll get success message if mail is sent correctly. Note that you cannot email folders.

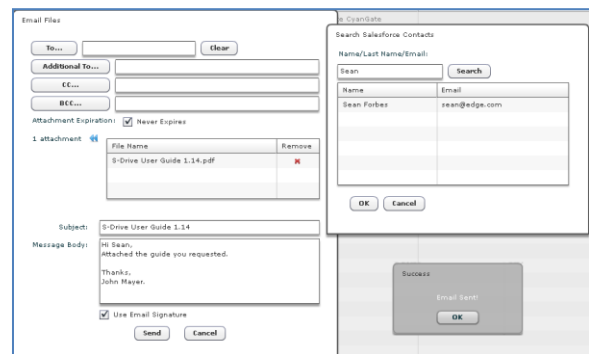


Figure 4

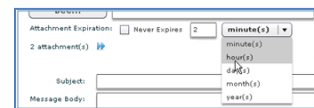


Figure 5

d. 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' button (✖️) from the Actions column of the selected file/folder. You'll be asked 'Do you want to delete selected item(s)?' after clicking 'Delete' button. Select 'Yes' option to delete files/folders (Figure 6). You cannot delete folders that contain files or subfolders.



Figure 6



e. Downloading Files

To download a single file with one click, select a file and then click 'Download File' button () from the Actions column of the selected file. 'Select Location' popup will be opened after clicking the download link. Select a folder to save the file to your computer and click 'Save' button to start downloading. 'Download Progress Bar' will be displayed while download is in progress (Figure 7). Note that you cannot download folders.

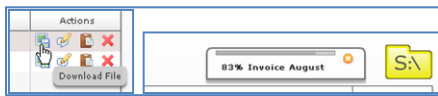


Figure 7

To download files using 'Download Manager', select files and then click 'Download File(s)' button (Figure 8-a). 'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen (Figure 8-b). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.

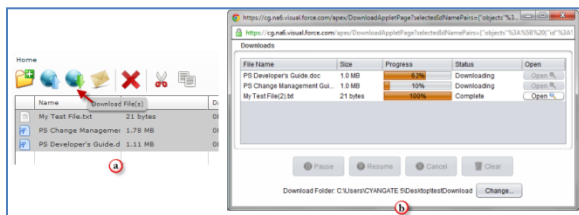


Figure 8

f. 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 ().

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 ().

Alternatively you can use right click menu for cut-copy-paste operations. Progress window will be displayed and files will be copied or moved to the target folder (Figure 9). Note that copy/move operations are not allowed on folders.

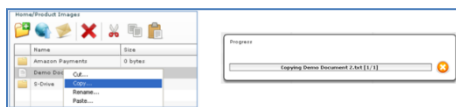


Figure 9

g. Renaming Files/Folders

Right click the file or folder you want to rename and select 'Rename' from the menu. Type in the new name and click 'OK' button (Figure 10).



Figure 10

h. Editing File/Folder Description

Select the file or folder you want to edit its description and go to the 'Actions' column of the selected item. Click the 'Edit Description' button to edit the description. Type in the new description and click 'OK' button (Figure 11).



Figure 11

i. Copying URL to Clipboard

For copying URL of a file to clipboard, select a file then go to the 'Actions' column of the selected item. Click the 'Copy URL to Clipboard' button. You'll be informed that the file has been copied to your clipboard (Figure 12). Now you can paste the URL.



Figure 12

2. 'S-Drive Attachments' Screen

'S-Drive Attachments' is the object (such as cases, accounts, etc.) attachments for S-Drive. You can create folders and upload files to objects without file size limitations using S-Drive Attachments. You can also attach files to the objects from S-Drive Folders. You can browse into the folders by using the current folder information holder (Figure 13).

Figure 13

'S-Drive Attachments' has three sections: 'Buttons' (Figure 14), 'Navigation Panel and Search Box' (Figure 15) and 'Attachments' (Figure 16).

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

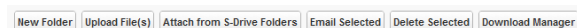


Figure 14



'Navigation Panel and Search Box' has navigation panel to easily browse between folders and a search box to search files and folders.

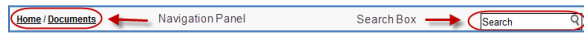


Figure 15

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

Actions	File Name	File Size	Created By	Created Date	Description
<input type="checkbox"/> Download Copy URL Edit Del	Africa Sales	10 bytes	CyanGate CyanGate	Thu Aug 05 09:08:26 GMT 2010	
<input checked="" type="checkbox"/> Download Copy URL Edit Del	S-Drive User Guide 1.14.pdf	2.27 MB	CyanGate CyanGate	Thu Dec 30 11:13:09 GMT 2010	S-Drive User Guide

Figure 16

a. Creating Folders

Click 'New Folder' button to create a folder for the selected object (Figure 14).

Once you click the button, 'New Folder' screen will be displayed. Type in the folder name and click 'Create' button to create the new folder. You can create subfolders inside folders and there can be multiple folders with same name in a folder (Figure 17).

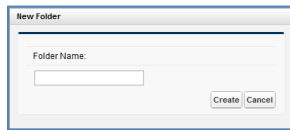


Figure 17

You can browse between folders using the current folder information holder, above the 'Actions' column (Figure 18).

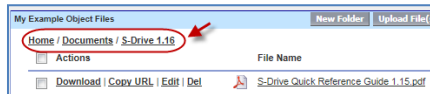


Figure 18

b. Uploading Attachments

Click 'Upload File(s)' button at the top level or inside a folder to upload files. (Figure 14).

Once you click the button, 'Upload Screen' will be opened with a welcome message: 'Welcome to the Upload Page. Click OK to start uploading files' (Figure 19). Click 'OK' button to start uploading files (Figure 20). You can follow the same steps described in '1-b. Uploading Files' section to upload files into 'S-Drive Attachments'.

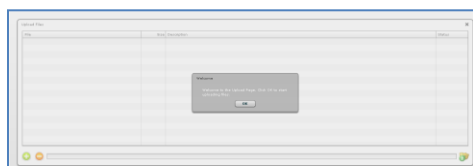


Figure 19

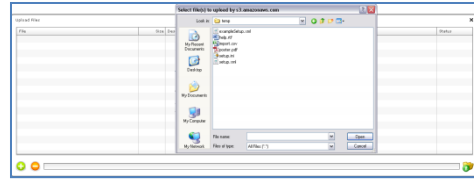


Figure 20

c. Attaching Files from S-Drive Folders

Click 'Attach from S-Drive Folders' button to attach files from 'S-Drive Folders' (Figure 14). This will bring the 'S-Drive Folders' screen with two additional buttons: 'Attach File(s)' and 'Cancel Attach' (Figure 21). 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.



Figure 21

d. Emailing Selected Attachments

Select one or more files using checkboxes next to each file. Click 'Email Selected' button to email selected files (Figure 22). This will bring the 'Email Screen' described in '1-c. Emailing Files' section.

Actions	File Name	File Size	Created By
<input checked="" type="checkbox"/> Download Copy URL Edit Del	Africa Sales	10 bytes	CyanGate CyanGate

Figure 22

e. Deleting Selected Attachments

Select one or more files using checkboxes next to each file. Click 'Delete Selected' button to delete selected files from 'S-Drive Attachments' (Figure 23). Alternatively you can delete files one by one using Del link in the 'Actions' column of the selected file.

Actions	File Name	File Size	Created By
<input checked="" type="checkbox"/> Download Copy URL Edit Del	Africa Sales	10 bytes	CyanGate CyanGate
<input checked="" type="checkbox"/> Download Copy URL Edit Del	S-Drive User Guide 1.14.pdf	2.27 MB	CyanGate CyanGate

Figure 23

f. Downloading Selected Attachment

You can download a single 'S-Drive Attachment' by clicking 'Download' link in the 'Actions' column of the selected file (Figure 23).



You can download multiple 'S-Drive Attachments' by selecting files and then clicking 'Download Manager' button. Note that you cannot download folders (Figure 24).

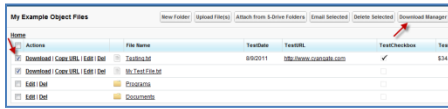


Figure 24

'Download Manager' screen will be opened and downloads will start. You can see the progress; pause, resume, cancel or clear the downloads and change the download target folder from 'Download Manager' screen (Figure 25). Note that, to use 'Download Manager' feature it needs to be enabled by your system administrator.

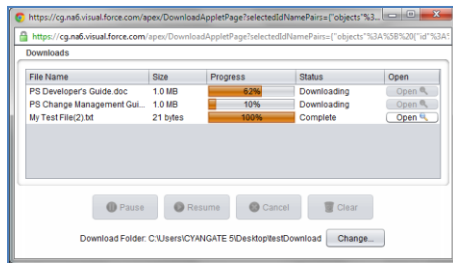


Figure 25

g. Copying URL of a Selected Attachment

You can copy URL of an 'S-Drive Attachment' by clicking 'Copy URL' link in the 'Actions' column of the selected file (Figure 23).

h. Editing Description of a Selected Attachment

You can edit description of an 'S-Drive Attachment' or a folder by clicking 'Edit' link in the 'Actions' column of the selected file (Figure 23).

i. Searching S-Drive Attachments

With version 1.17, you can search for files and folders inside S-Drive Attachments (Figure 26).

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

Results are displayed in the same section with a 'X Result(s) Found' header and some buttons are disabled in the search results screen. You can go back to home by clicking 'Back to Home' link on the left of the screen.

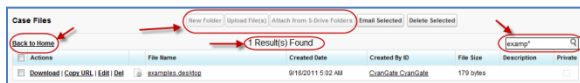


Figure 26

3. S-Drive Support

You can contact S-Drive Support Team for any questions or problems that you couldn't solve using;

- S-Drive Installation Guide
- S-Drive User Guide
- S-Drive Customer Portal Guide

1. Open a ticket at Support Site: <http://sdrive.cyangate.com/support/>

2. Email: sdrive@cyangate.com

Latest updates and documentation can be found in <http://www.cyangate.com/>