S-Drive Quick-Start Guide v1.17

1. Installation

Go to "S-Drive Product Page" (sdrive.cyangate.com). And click "Get It Now". Answer the questions, confirm the installation and click on "Install" button. After submitting your Salesforce password click Continue/Next until the UI asks you to choose security level. Click on "Grant access to all users" and click "Next" and click "Install". After installation finishes, click on "Deploy Now" and then "Deploy" option.

2. Notes for the Customers Upgrading to 1.17

S-Drive 1.16 installed customers can upgrade to version 1.17 without need for further configuration. To upgrade S-Drive 1.15.4 (or previous versions) to 1.17, you need to pay attention to these notes:

- In S-Drive 1.17, folders for the "S-Drive Attachments" are supported. You need to add a new field (Parent Folder Id) to your "File Object" to make it work.
- You also need to increase your Visualforce pages' Salesforce.com API version numbers to at least 22.

3. Displaying S-Drive Tab in Sales App

Go to "Setup" -> "Personal Setup" -> "My Personal Information" -> "Change My Display". Click "Customize My Tabs" button. Select "Sales" from the "Custom App" drop down box. Move "S-Drive" from "Available Tabs" box to "Selected Tabs". Click "Save"

4. Activating S-Drive

Click on "S-Drive" tab. If you do not see any error about remote settings, then you have successfully configured remote settings. Otherwise:

- Go to "Setup" -> "Administration Setup" -> "Security Controls" -> "Remote Site Settings"
- Click "New Remote Site" button. Add these two remote sites:

Remote Site Name	Remote Site URL
LS	https://ls.amazonaws.com
S3	https://s3.amazonaws.com

Now click on the Pay easily with Amazon Payments image.

- If you do not have an Amazon.com account, you can get a new account by typing your email address and selecting "I am a new user" option
- If you already have an Amazon.com account, type in your username, select "I am a returning user, and my password is:" option and type your password.

You'll enter your payment details in the next screen. Then, click "Place your order" to complete entering your payment information.

After completing payment options, it may require you to login to your Salesforce.com account again. If required, type your credentials and login. You'll see the "Welcome to S-Drive! You have activated your product" message and S-Drive screen. Click Close (X) on the right-corner of the screen to close the Amazon Payments information.

This step is not necessary if you saw the "Welcome to S-Drive! You have activated your product" message in the previous step. If auto-activation did not work, you can use the generated Activation Key (at the top-right corner of the page) to activate S-Drive. After retrieving your Activation Key, you will need to go back to the "S-Drive Activation Page" by clicking on the "S-Drive" tab and type in your Activation Key. Click Activate button to complete activating S-Drive

5. Configuring Standard/Custom Object Attachment Upload Feature

<u>S-Drive stores all file information as Salesforce.com records on objects that represent each file on Amazon storage. In order to store file information, you can either use the S-Drive provided file objects for the Case, Contact, Account and Opportunity objects or you can create your own.</u>

<u>Creating Custom Object Files</u>

- Go to "Setup" -> "App Setup" -> "Create" -> "Objects". And click "New Custom Object" button. Fill in the required fields to create a new custom object (for example, named as "My Example Object File"). For "Record Name" field, type "My Example Object File Number". Select "Auto Number" as "Data Type". Type in "A-{0000}" for "Display Format" and "1" for" Starting Number"
- Check if the "Deployment Status" is set to "Deployed". Then click "Save" button to create the custom object file
- After creating custom object, create fields for that object. So, to create fields to "My Example Object File" object, click on "Custom fields & Relationships" and create the following fields: (while creating, make sure that all fields are visible to all users):
  - Content Type — Type = Text
Length = 255
  - Description — Type = Text Area(Long)
Length = 32,000
Visible Lines = 3
  - File Name — Type = Text
Length = 255
  - File Size in Bytes — Type = Number
Length = 18
  - Parent — Type=Master-Detail Relationship
Related to = My Example Object

- Parent Folder Id — Type = Text
  Length = 255
- File Size — Type = Formula
  Formula Return Type = Text

  Copy and paste below code to "Simple Formula" field.

```
IF(File_Size_in_Bytes__c > 1024,
IF(File_Size_in_Bytes__c > 1048576,
TEXT(ROUND((File_Size_in_Bytes__c /1048576),2)) & " MB",
TEXT(ROUND((File_Size_in_Bytes__c /1024),2)) & " KB"),
TEXT(File_Size_in_Bytes__c) & " bytes")
```

  Click "Check Syntax" button to see if you have correctly typed the formula.

- WIP — Type = Checkbox
  Default Value = Checked
- Private *(This field is optional)*
  Type = Checkbox
  Default Value = Unchecked

  You need to create this field only if you are planning to use "privateEnabled" component property in "AttachmentComponent". For more information, about usage/setting of this property see" S-Drive Installation Guide"(page 21).

<u>Creating Before Delete Trigger for Custom Object</u>*(Optional)*

Because this is optional, you can find detailed information about this section in "S-Drive Installation Guide" (page 22).

<u>Creating Custom Object Files Page</u>

In this step we'll create custom object file's Visualforce page. This page can be used to override the object's view or it also can be used as an inline section for the object's layout. At the end of this section, use cases for both scenarios will be displayed. To create an object file page, follow these steps:

- Go to "Setup" -> "App Setup" -> "Develop"-> "Pages" and click the "New" button at the top of the page. Create a page (For example "MyExample" page). And type following code inside the page:

```
<apex:page standardController="My_Example_Object__c"
           tabStyle="My_Example_Object__c">
  <apex:detail inlineEdit="true"
               relatedList="true"
               showChatter="true"/>
  <cg:AttachmentComponent title="My Example Object Files"
      inline="true"
      customObjectName="My_Example_Object__c"
      customObjectFileName="My_Example_Object_File__c"
      objectId="{!My_Example_Object__c.Id}" />
</apex:page>
```

  Remember that this is just an example. You need to set these component attributes based on your configuration. For more information about component attributes refer to "S-Drive Installation Guide" (pages 26-30)

- Now set the security for your page on other profiles. Go to "Setup" -> "App Setup" -> "Develop" -> "Pages" and click "Security" link next to your page name. Move all profiles (or select based on your needs) from "Available Profiles" to "Enabled Profiles". Now we have an object (or created our custom object), created our custom object file and custom object file page. At this point, we can override the custom object's view or we can use "S-Drive Attachments" as an inline section in the page layout:

  - <u>Overriding the View of the Object</u>

    Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Standard Buttons and Links" page block and click "Edit" action next to the "View" label. Then select Visualforce Page for *Override With* section and pick "MyExampleFilePage" (the custom page you created previously for this object) from the drop-down box. Click "Save" button to complete the override. After creating a test object you should see "My Example Object Files" page block at the end of the object detail page. See "User Guide" for more information on how to use the buttons and functions in this page block

  - <u>Using as Inline Attachment</u>

    To use Inline Attachment property first of all, we need to set "inline" property to "true". That is, in the example page we have created above,<<inline = "true" >> must be included to use Inline Attachments.
    Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Page Layouts" page block and click "Edit" action next to the main layout of the object. Click "Fields" and drag-drop a Section to an appropriate place in the layout.

    After dropping the "Section", you'll see the properties screen for the dropped "Section". Type in a section name and select if you want to display section header on detail page and edit page. Also select "1-column" for the layout. Then click "OK" button. You can customize these settings based on your layout needs.

    Now, go to Visualforce Pages from the top. Select the "Custom page name" you created (eg. TestPage) and drag it into the section that you created previously. After dropping the page into the section, click the properties icon for the page on the top-right corner of the page in the section. Keep "Width (in pixels or %)" as "100%", set "Height (in pixels)" to "500". And check "Show scrollbars" option. You can optionally check "Show label". Click OK button. We are done with the configuration. Save the layout by clicking the "Save" button on the left-top corner of the screen.

    Now if you go to your object's tab (page), you'll see the S-Drive Attachments inline in the page layout.

6. Allowing Customer Portal Users to Upload Case Files From Customer Portal

Go to "Setup" -> "App Setup" -> "Create" -> "Objects". Click "Edit" next to the "Case File" object. Scroll down to the "Optional Features" in "Edit" page. Check "Available for Customer Portal" and click "Save".

Go to “Setup” -> “Administration Setup” -> “Manage Users” -> “Profiles” and click “Edit” next to your currently installed “Customer Portal Manager” installation Note that selected profile must be a cloned profile to make changes on it.

Scroll to the “Custom Object Permissions” section. Give Read, Create, Edit and Delete access to the “Case Files” custom object by checking the appropriate checkboxes, then click “Save”.

(Optional) To Remove Submit & Add Attachments button from new case creation screen, look at the “S-Drive Installation Guide” (page 37).

7. S-Drive Configuration

Organization administrators can use S-Drive Configuration to set organization-wide configurations and get information about S-Drive credentials, usage and billing. Using S-Drive Configuration, it is possible to:

- Enable/Disable Download Manager,
- Enable/Disable Checksum Verification,
- Enable/Disable Browser Download,
- Embed Thread Id In Case Emails,
- Specify Restricted Portal User Profiles,
- Specify Case Email Reply-To Address,
- Specify Custom Email Footer,
- Specify Max File Size in MBs,
- Specify Default Email Expiration Time,
- Change field display settings of S-Drive Attachment objects.

You can refer to “S-Drive Installation Guide” (page 38) for detailed information.

8. S-Drive Reports

With version 1.17, you can create “File Activity” reports for the S-Drive files. For Accounts, Cases, Contacts, Opportunities and S3Objects reports are enabled by default. For other standard/custom object files you need to create a lookup relationship under File Activity object:

- Go to “Setup” -> “App Setup” -> “Create” -> “Objects” and click the “File Activity” object name. Scroll to the “Custom Fields & Relationships” for the object and click “New” button. Choose the field type" screen, select "Lookup Relationship" and click "Next" button.
- Choose the related object screen, select "Related To" from the drop-down as your object file (e.g. My Example Object File) and click "Next" button. Keep default values for other steps and click "Save" buton

S-Drive Reports tracks following activities:

- S-Drive OneClick Download
- S-Drive CopyUrl Download
- S-Drive DownloadManager Download Started
- S-Drive DownloadManager Download Completed
- S-Drive Email Sent

For more information about S-Drive Reports, refer to “S-Drive Installation Guide” (page 44)

9. Sharing Rules and Permissions

S-Drive Attachments support all sharing rules similar to related objects. S-Drive Folders does not fully support sharing but it is sharing-aware.

For more information about Sharing Rules, refer to “S-Drive Installation Guide” (page 47).

You can apply profile based permissions on custom object files. S-Drive supports four different access levels:

- *None*
- *Read*
- *Read + Create + Edit*
- *Read + Create + Edit + Delete*

To set these profiles based on permissions go to “Setup” -> “Administration Setup” -> “Manage Users” -> “Profiles” menu. Click on the “Edit” link next to the name of the profile you want to edit. Note that you cannot change the standard profiles’ permissions. You may need to clone them before you can edit. Inside the “Edit” screen of the selected profile, scroll down to the “Custom Object Permissions” section. You’ll see the “Basic Access” selections for your custom object files. You will need to check/uncheck these boxes based on your needs.

For more information and examples about S-Drive Permissions refer to “S-Drive Installation Guide” (page 53).