

S3-Link User Guide

Introduction

This document is prepared specially for end users of your Salesforce org to use our basic features. This document is for the basic version only. If you have installed our premium version, please contact our support team to get you our admin guide for the latest premium version.

Prerequisite

Please refer to the following S3-Link documentation for additional information:

1. S3-Link Deployment Guide
2. S3-Link Admin Guide

Creating File/Folder

A file represents any attachment you want to link with any record. For each instance of the target, there is an assessment. In addition to pointing to the assigned regulations and target, an assessment also contains the scores and references to data structures that track the results.

Before you move forward to understand the features in S3-Link applications, it is significant that you get familiar with the file hierarchy:

- A folder contains one or more sub-folders. It also contains one or more files
- A file contains one or more file access controls. It also contains download history.

- **New File**

Here are the places where you can create a new file.

1. Folder detail

The screenshot shows the Salesforce interface for the 'S3-Link' folder. The breadcrumb navigation includes 'Home', 'S3 Link Administration', 'File System', and 'Accounts'. The folder name 'S3 Link Guides' is displayed with a folder icon. Below the folder name, there are two tabs: 'RELATED' and 'DETAILS'. Under the 'RELATED' tab, there are two sections: 'Sub Folders (0)' with a 'New' button, and 'Files (5)' with 'New' and 'Send Email' buttons. The 'Files (5)' section contains a table with the following data:

NAME	DESCRIPTION	DOWNLOAD	SALESFORCE ACCESS TYPE
S3 Link Users Guide.docx			Public Download Only
S3 Link for Salesforce Objects.docx			Public Download Only
S3 Link Admins Guide.docx			Public Download Only
S3 Link Amazon Sign Up Guide.docx			Public Download Only
S3 Link Deployment Guide.docx			Public Download Only

A 'View All' link is located at the bottom right of the table.

2. File Explore page

The screenshot shows the Salesforce File Explorer interface. The breadcrumb navigation includes 'Home', 'S3 Link Administration', 'File System', and 'Accounts'. The left sidebar shows a tree view with 'Home' expanded to show 'sfstestdrive' and its subfolders: 'Customers', 'Other Documents', 'Images', 'Test Docs', and 'S3 Link Guides'. The main content area shows the 'sfstestdrive' folder with 6 items, sorted by Created Date. The items are:

- Customers (1) - Oct 18, 2016 06:42:43 - Admin User
- Other Documents (4) - Apr 14, 2017 05:06:52 - Admin User
- Images (0) - Apr 14, 2017 05:24:42 - Admin User
- Invoices (0) - Apr 14, 2017 05:29:02 - Admin User
- Test Docs (2) - Apr 14, 2017 05:45:55 - Admin User
- S3 Link Guides (5) - Apr 14, 2017 05:58:07 - Admin User

Each item has a 'Detail' button next to it. The interface also includes a search bar and various action icons at the top right.

3. Record detail with S3-Files is enabled

The screenshot shows the Salesforce interface for an S3-Link account. At the top, there is a search bar labeled "Search Salesforce". Below it, a navigation bar includes "S3-Link", "Home", "S3 Link Administration", "File System", and "Accounts". The account name is "Burlington Textiles Corp of America".

Under the "ACCOUNT" header, there are two tabs: "RELATED" and "DETAILS".

The "RELATED" section contains three items:

- Learn More Using Twitter:** A card with a "Sign in with Twitter" button and the text "Sign in to link a Twitter profile, find people in common, and quickly access recent tweets."
- Duplicates:** A card with a magnifying glass icon and the text "We found no potential duplicates of this account."
- Files (0):** A card with a document icon, a "New" button, and a "Send Email" button.

The "DETAILS" section shows:

- Contacts (1):** A card with a "New" button and a list of contacts.

Name	Title	Email	Phone
Jack Rogers	VP, Facilities	jrogers@burlington.com	(336) 222-7000

A "View All" link is located at the bottom right of the contacts section.

- **New Folder**

Here are the places where you can create a new folder.

1. Folder detail

The screenshot shows the Salesforce interface for an S3-Link folder. At the top, there is a search bar labeled "Search Salesforce". Below it, a navigation bar includes "S3-Link", "Home", "S3 Link Administration", "File System", and "Accounts". The folder name is "S3 Link Guides".

Under the "FOLDER" header, there are two tabs: "RELATED" and "DETAILS".

The "RELATED" section contains one item:

- Sub Folders (0):** A card with a folder icon, a "New" button, and a "Send Email" button.

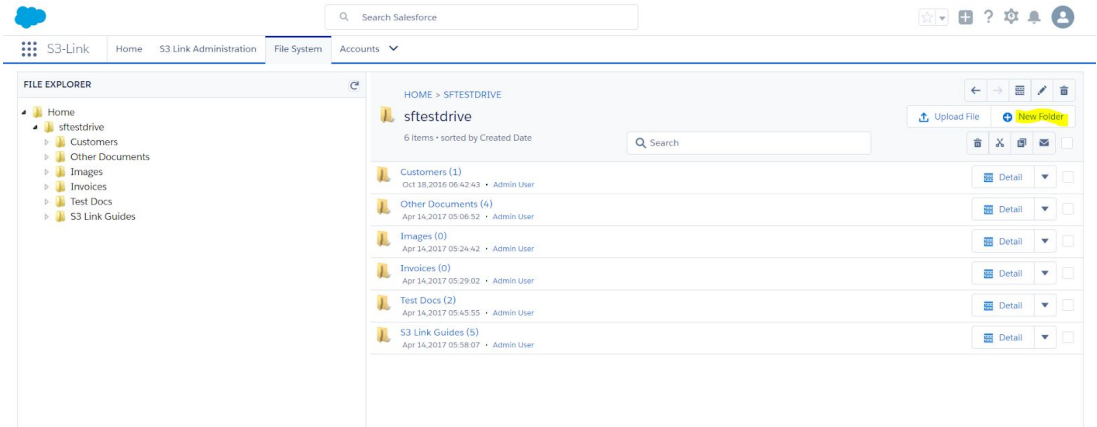
The "DETAILS" section shows:

- Files (5):** A card with a document icon, a "New" button, and a "Send Email" button. Below it is a table of files.

NAME	DESCRIPTION	DOWNLOAD	SALESFORCE ACCESS TYPE
S3 Link Users Guide.docx			Public Download Only
S3 Link for Salesforce Objects.docx			Public Download Only
S3 Link Admins Guide.docx			Public Download Only
S3 Link Amazon Sign Up Guide.docx			Public Download Only
S3 Link Deployment Guide.docx			Public Download Only

A "View All" link is located at the bottom right of the files section.

2. File Explore page

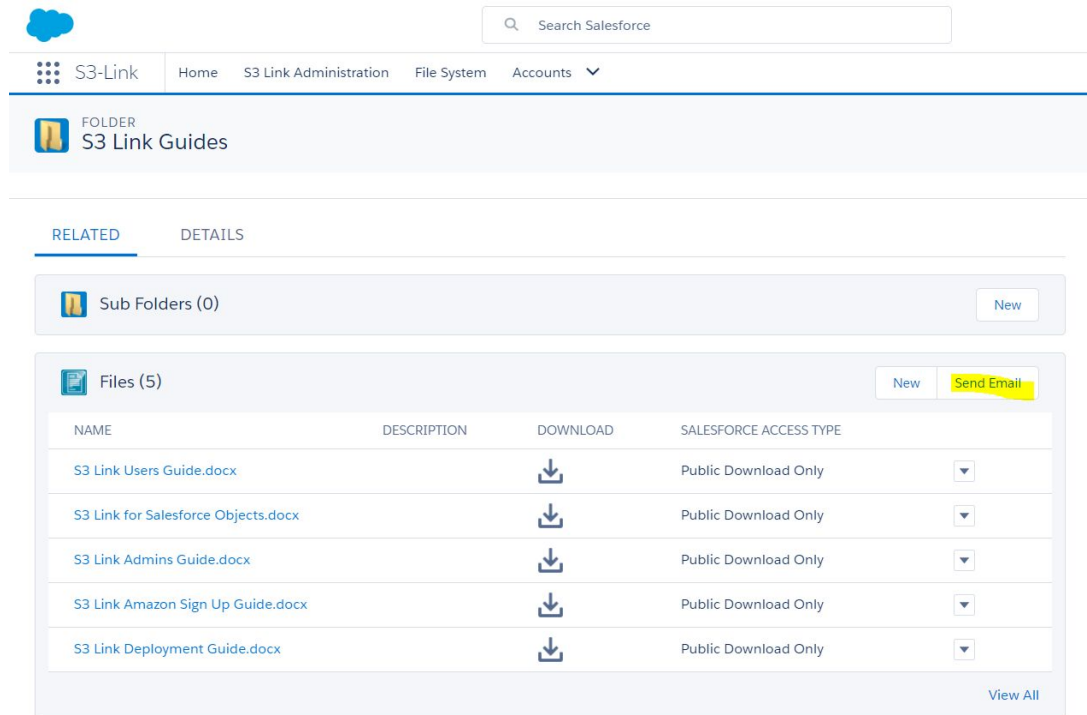


- **Email Files to Users**

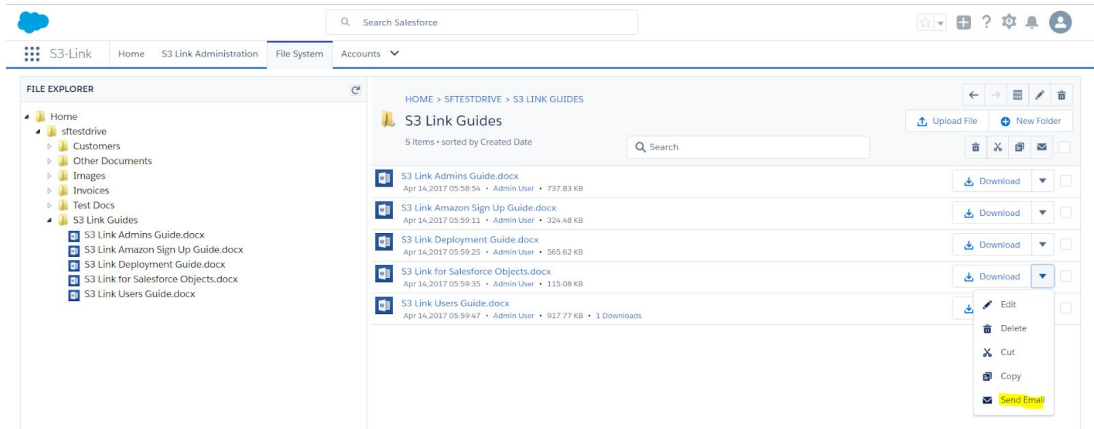
With this feature, you can email files with download links to any user in your org or users outside of your org. Same email will be CC to the current user, so users get an idea for what reason that file is sent to other users. Along with file details, **Download** link will also be sent to users so they can download it from Amazon.

Here are the places where you can email files.

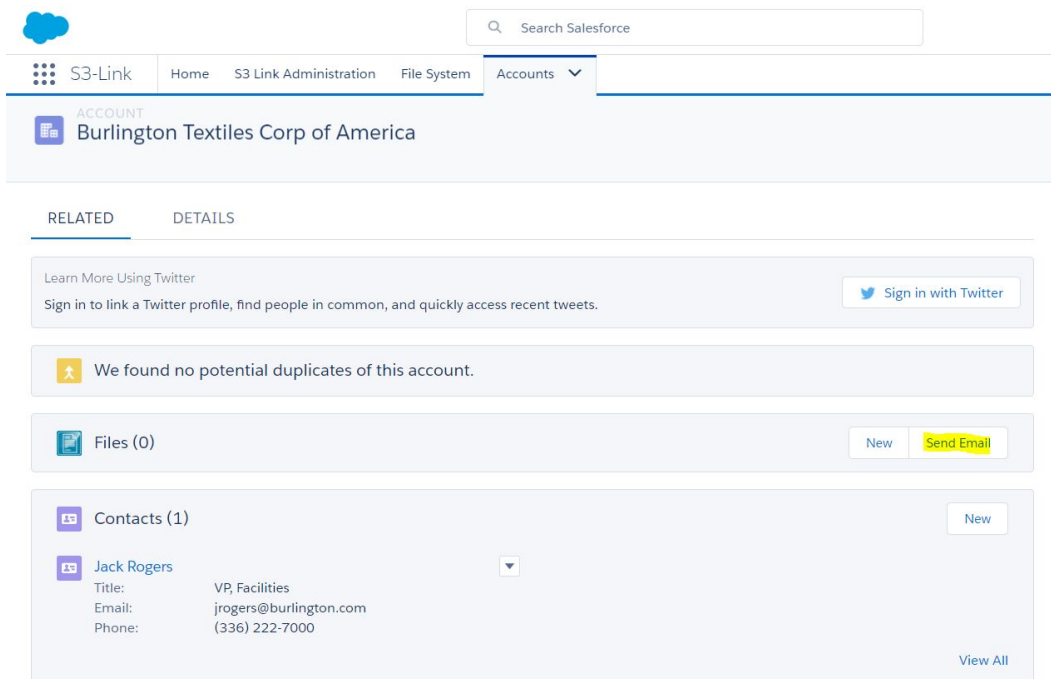
1. Folder detail



2. File Explore page



3. Record detail with S3-Files is enabled

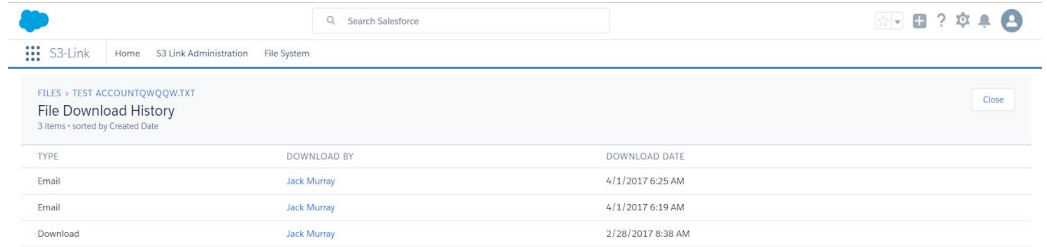


- **File Download History**

As an owner of Private file, you can see the list of users who have downloaded the file from Amazon S3. File downloads will be tracked only if it's enabled by System Admin. Here are few places from where file owner can see download history for files:

1. File Detail

- Go to File detail
- Click on **File Download History** button at the



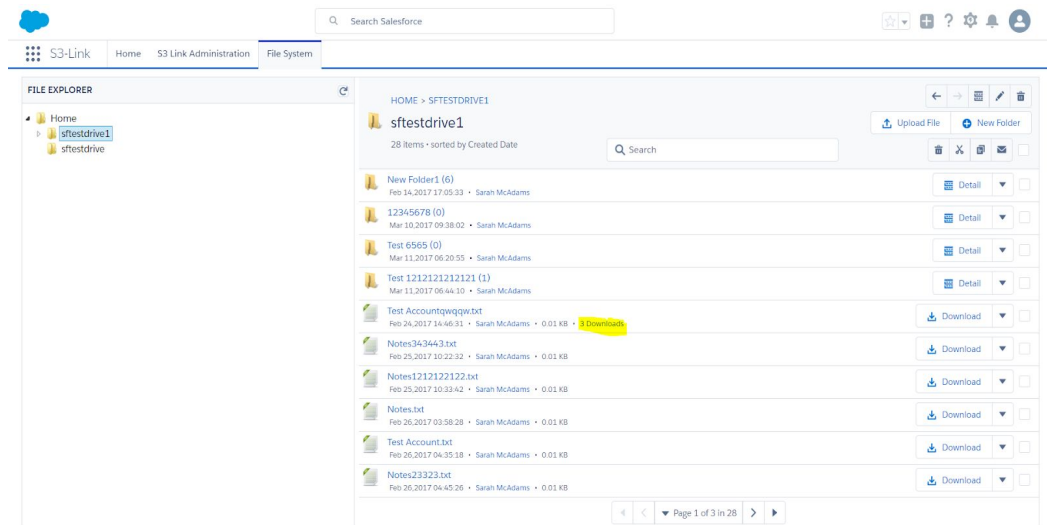
FILES > TEST ACCOUNTQWQQW.TXT
File Download History
3 items - sorted by Created Date

TYPE	DOWNLOAD BY	DOWNLOAD DATE
Email	Jack Murray	4/1/2017 6:25 AM
Email	Jack Murray	4/1/2017 6:19 AM
Download	Jack Murray	2/28/2017 8:38 AM

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2. S3-File Explorer

- Go to S3-File Explorer tab
- Explore for the file.
- Click on the link shown below



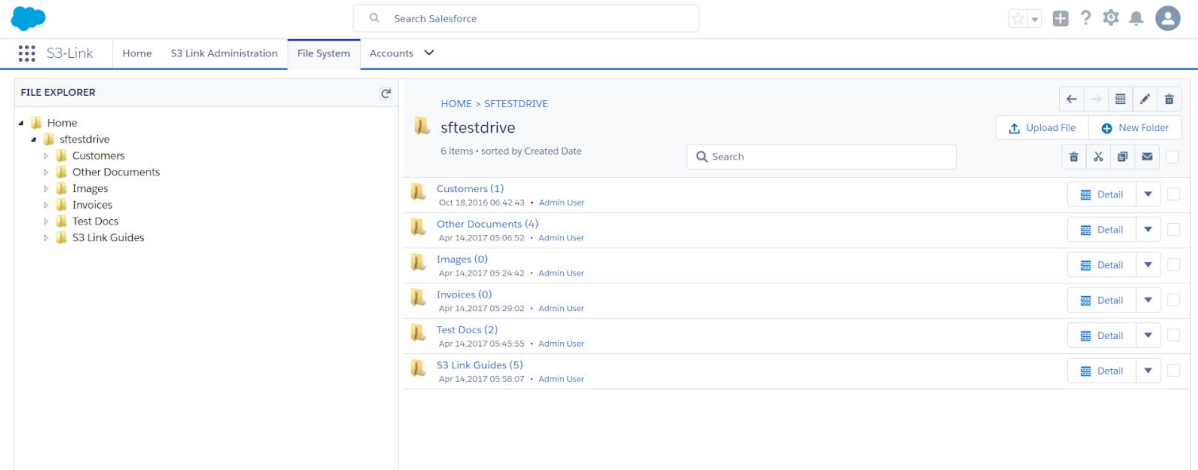
HOME > SFTESTDRIVE1
28 items - sorted by Created Date

New Folder1 (6)	Feb 14, 2017 17:05:33	Sarah McAdams	Detail
12345678 (0)	Mar 10, 2017 09:38:02	Sarah McAdams	Detail
Test 6565 (0)	Mar 11, 2017 06:20:55	Sarah McAdams	Detail
Test 1212121212121 (1)	Mar 11, 2017 06:44:10	Sarah McAdams	Detail
Test Accountqwwqqw.txt	Feb 26, 2017 14:46:31	Sarah McAdams	Download
Notes343443.txt	Feb 25, 2017 10:22:32	Sarah McAdams	Download
Notes1212122122.txt	Feb 25, 2017 10:33:42	Sarah McAdams	Download
Notes.txt	Feb 26, 2017 03:58:28	Sarah McAdams	Download
Test Account.txt	Feb 26, 2017 04:35:18	Sarah McAdams	Download
Notes23323.txt	Feb 26, 2017 04:45:26	Sarah McAdams	Download

- **S3-File Explorer**

You can explore your file in file explorer. File System tab display only those files which are not linked to any Salesforce object.

From file explorer you can create a new folder and upload files. The new folder / file will be created under the current selected folder only.



- Here a new file / folder will be created under the data folder.
- You can also search files / folders under the current folder using the search box.
- You can copy / move files or folders from one folder to another folder. For that you have to do the **Copy** or **Cut** for all files and folders you want to move and then go to that folder where you want to paste it. There you will see a paste button. Click that button. Files will be copied or moved.
- You can also edit files / folders properties by clicking the **Edit** link.
- **Delete** for folder will delete all subfolders and files under that folder.