



iTools File Cabinet Configuration Guide

Last Revised: March 12, 2013



Welcome

Thank you for choosing iTools for Salesforce CRM by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce CRM tools that will enhance your Salesforce CRM experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce CRM.

This configuration guide assumes that the Configuration Manager has already been installed and will lead you through the installation process and configuration of the iTool File Cabinet.

About iTools File Cabinet

iTools File Cabinet lets you take advantage of the incredibly cost effective Amazon S3 storage service to make files available to users in the native Salesforce CRM user interface. Simply copy the files to your S3 account to make presentations, brochures, testimonials, price sheets, company forms, sales reports and other files easily accessible to your sales team from inside Salesforce CRM.

Additional benefits of the iTools File Cabinet include:

- Control the display of file collections using native Salesforce CRM security, eliminating the need to manage complex network or S3 security schemas.
- Access files securely and remotely while reducing demands on your corporate VPN.
- Let Amazon back-up and store your files off-site, reducing your internal costs and resource requirements.

Installation and Configuration Overview

This guide will lead you through the necessary installation and configuration steps for iTools File Cabinet. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are five basic parts to the process. To begin, this guide shows how to install the iTools File Cabinet into your Salesforce CRM environment. Second, it will explain each of the major components of the solution. Third it leads you through the process of deploying and configuring the iTool. Fourth, this guide explains how to properly apply File Cabinet licensing. And finally, this guide will explain each of the File Cabinet's iTools Settings; configuration options that enable you to configure the iTool to meet the specific needs of your organization. If at any time, you encounter issues or have questions, please contact us using any of the methods described in the Help and Support section.



Version Updates

New In Version 2.5

Based on direct feedback from our customers, version 2.5 includes the following feature enhancements:

Support for Bucket Locations: File Cabinets (S3 buckets) can now reside on any of the 8 Amazon data center locations that support the Simple Storage Service. In addition to the US Standard option previously supported you can host buckets on any of the following servers:

- US West (Oregon)
- US West (Northern California)
- EU (Ireland)
- Asia Pacific (Singapore)
- Asia Pacific (Sydney)
- Asia Pacific (Tokyo)
- South America (Sao Paulo)

NOTE: If you choose to use a location other than US Standard you will need to add the location's endpoint URL to your Remote Site Settings.



Table of Contents

Before You Begin	5
Installing iTools File Cabinet	6
File Cabinet Introduction	12
Amazon S3 Components	12
S3 Account	12
S3 Bucket	12
S3 Folders	13
iTools File Cabinet Components	13
File Cabinets	13
File Cabinet Drawers	14
Distributing Files to Salesforce CRM Users	15
Configuring iTools File Cabinet	16
AWS Credentials	16
Create S3 Bucket(s)	20
Add Remote Site(s)	22
Create S3 Folder(s)	23
Add Files to S3	24
File Cabinet Administration	24
Create File Cabinet(s)	27
Edit File Cabinet	30
Delete File Cabinet	32
File Cabinet Security	32
Licensing	34
iTools Settings	36
ModifyAllRequired	37
AWSCredentials	37
HomePageLayout	37
FilesPerPage	40
HideFileExtension	40
Help and Support	41



Before You Begin

iTools are designed for use with Salesforce CRM Professional Edition (PE), Developer Edition (DE), Enterprise Edition (EE) and Unlimited Edition (UE) or their sandboxes. Installation into any other edition is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools File Cabinet into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile in DE, EE and UE, is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 3.6 or greater must be installed and a license assigned to your account. You should also be familiar with how to edit iTools Settings using the iTools Configuration Manager. There are instructions in the Configuration Manager Configuration Guide to help you.

iTools File Cabinet integrates with an Amazon S3 account owned by your organization. You must have an Amazon S3 account to use iTools File Cabinet. If your organization does not have an S3 account, you can easily set up one from this webpage: <http://aws.amazon.com/s3/>

Finally, the current version of iTools File Cabinet provides access to files on an S3 account, but it does not provide support to upload or organize files in buckets and folders. To perform these types of actions, you will need a separate application. If your organization has been using S3 for other file storage needs, you may have already selected an application to perform these tasks. If you are new to S3, InSitu Software recommends **Cloudberry Explorer for Amazon S3** from Cloudberry Labs (www.cloudberrylab.com). The freeware version of the Cloudberry S3 Explorer is robust, easy to use, free, and known to work well with iTools File Cabinet. Cloudberry Labs also has a number of other reasonably priced tools to help you maximize the value of the Amazon S3 service.



Installing iTools File Cabinet

The iTools File Cabinet can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

<http://sites.force.com/appexchange/home>

2. Locate the listing for **iTools File Cabinet** by searching for “iTools File Cabinet” or direct your browser to:

<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001gGiiEAE>



Make sure you are on the AppExchange listing for the **iTools File Cabinet**. iTools for Salesforce CRM is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you are able to install only the iTools that you need in your environment.

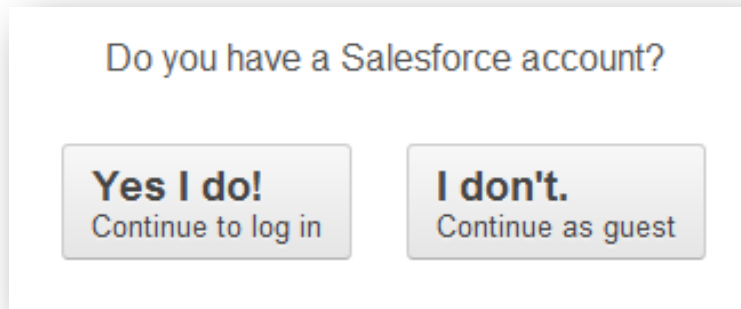
3. Click on **Get It Now**



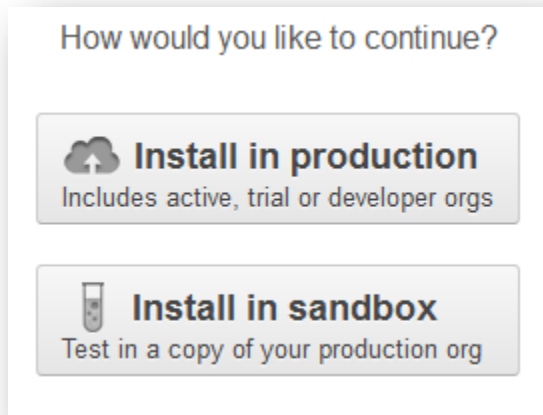
4. You must have a Salesforce account to install iTools File Cabinet. If you do not have a Salesforce account and would still like to try iTools File Cabinet, visit Salesforce.com and sign up for a new free trial of Salesforce CRM. Then start the installation process again beginning at Step 1 above.

In addition, you must also be a Salesforce system administrator to install iTools File Cabinet. If you are not a Salesforce system administrator, please ask your Salesforce system administrator to perform the iTools installation for you.

If you have a Salesforce account and have permission to install apps, choose Yes I do!



5. Enter your Salesforce credentials to log in to Salesforce. Then, choose the type of environment into which you would like to install. iTools will work in both Production and Sandbox orgs.





If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.

6. Please review the page carefully. The information section located at the top includes a link to the iTools File Cabinet Configuration Guide. This guide provides the most complete installation and configuration information, including step by step instructions along with helpful screen shots.


Also, review the Terms & Conditions and if you are in agreement, check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**. Then, click **Confirm and Install**.



Please Note: Even though the page shows 'Free' under the Subscription heading, there is a fee for the iTools for Salesforce CRM product suite as indicated on the AppExchange listing. For additional pricing information, visit our website at www.insitusoftware.com or the click the  image shown on the Overview Tab for the AppExchange listing.

PRICING 
Paid
Discounted for Nonprofits

Almost there!

 Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE iTools File Cabinet	ORGANIZATION Any Company. Inc.
VERSION iTools File Cabinet (2.5 / 2.5)	EDITION Developer Edition
SUBSCRIPTION Free	USER NAME jsmith@anycompany.com
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#) Confirm and Install!

7. Before the installation proceeds, you have the option to review all the components that will be added to your Salesforce org by iTools File Cabinet. The Package Name, Version and Description will also be noted. Click **Continue**.



Package Installation Details [Help for this Page](#)

Package Name	iTools File Cabinet
Version Name	2.5
Version Number	2.5
Publisher	InSitu Software LLC
Description	Reduce data storage costs by using Amazon S3 to securely store your important electronic files and iTools File Cabinet to easily access them from Salesforce CRM. Another valuable tool in the iTools for Salesforce CRM collection.

[Continue](#) [Cancel](#)



If you did not install the iTools Configuration Manager prior to attempting to install the iTools Employment Change Management, you will get an install error similar to the following:

Package install error
There are problems that prevent this package from being installed.

Problems

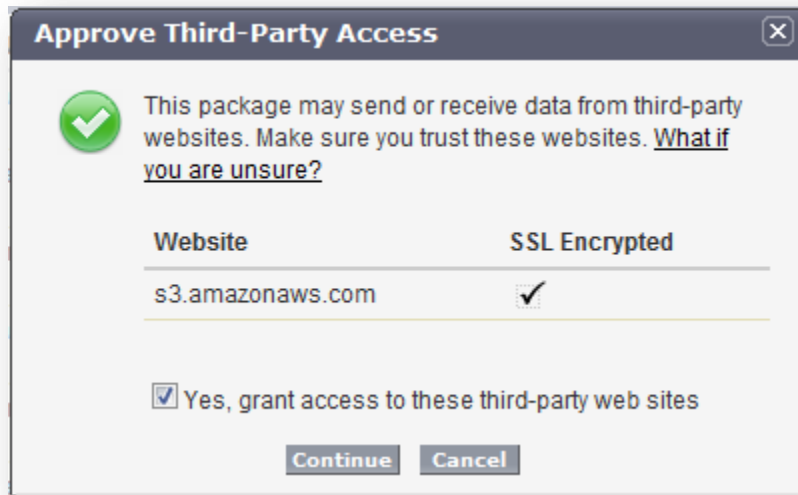
A required package is missing	Package "iTools Configuration Manager", Version 4.0 or later must be installed first.
-------------------------------	---

[Cancel](#)

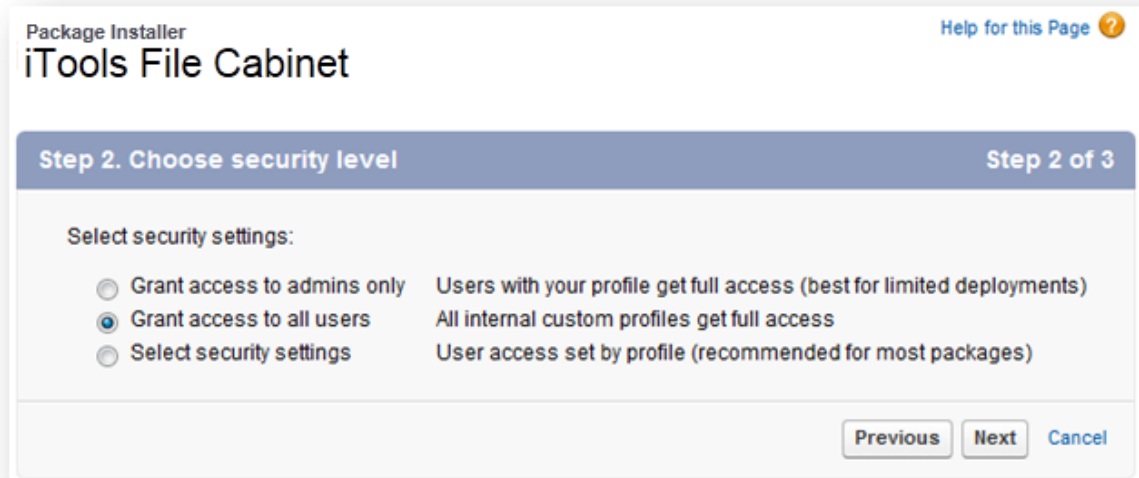
Click **Cancel** to exit and go to the AppExchange to install or upgrade to iTools Configuration Manager version 4.0 or later. Then, try the iTools File Cabinet installation again.



- iTools File Cabinet requires the Amazon AWS site to be authorized as a Remote Site. When prompted, clicks the **Yes, grant access to these third-party web sites** checkbox and then click on the **Continue** button.



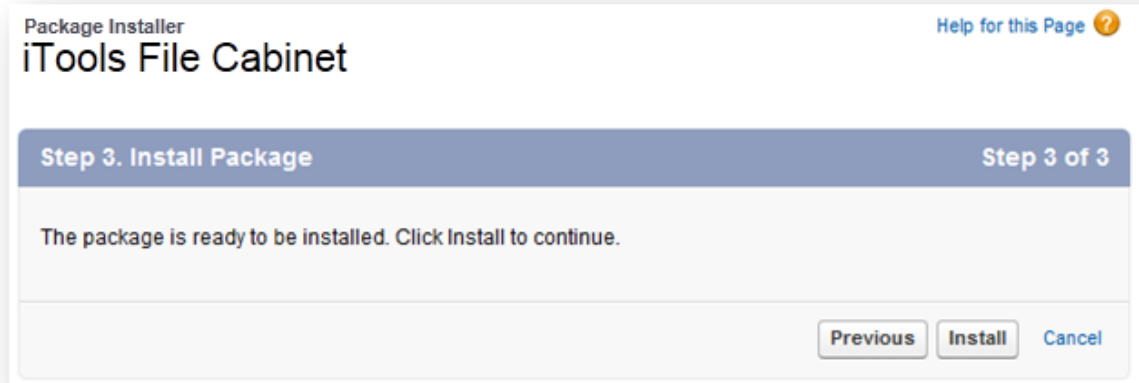
- iTools File Cabinet requires access to your Salesforce CRM objects through the API. Please review and approve the required access by clicking **Next**.
- Choose the security level. Since iTools File Cabinet is valuable to all users, InSitu Software recommends you select **Grant access to all users** and click **Next**.





If you currently use the Professional Edition of Salesforce CRM, you will not be given the option to Choose a Security Level. iTools File Cabinet is, however, fully functional in the Salesforce Professional Edition.

11. Begin the actual installation process by clicking **Install**.



The install process can take several minutes to run. If the process exceeds a specified amount of time, the following screen will display and you will be notified via email when the installation is complete.



Processing

[Help for this Page](#) ?

Your request is in progress. You will be notified by email when it completes.

If the install completed quickly, the Install Complete screen will be displayed:



Install Complete

Follow any remaining steps in the app install guide to complete deployment



File Cabinet Introduction

iTools File Cabinet is the low cost, low effort way to organize and access important company documents. With its simple *File Cabinet and Drawer* metaphor, users can quickly locate the files they need from the same place they find their most valuable sales and customer information – Salesforce CRM.

Capitalizing on the advantages of cloud computing, iTools File Cabinet has selected the premier cloud storage provider, Amazon Simple Storage Service (S3), to deliver a secure, cost-effective solution that seamlessly integrates into your Salesforce environment.

Because iTools File Cabinet integrates with an S3 account that you own and control, there are a few configuration steps required to properly match the structure and content of your S3 account with the iTools File Cabinets and Drawers in Salesforce CRM. Since you are new to iTools File Cabinet and may not have a lot of experience with S3, this section introduces you to the structure, components and terminology used by each system. With a solid understanding of the system basics, configuration and management of iTools File Cabinet will be a snap.

Amazon S3 Components

The Amazon S3 service has similar features to your computer file management system; its main purpose is to store and provide access to electronic files. In S3, files are organized into groups called *Buckets* and *Folders*. Keep in mind, that S3 is just a 'service', so a management application, like Cloudberry Explorer for Amazon S3, is needed to perform operations for your account such as creating Buckets and Folders and copying files into them.

S3 Account

iTools File Cabinet integrates with an Amazon S3 account owned and configured by your organization. All files made available to your organization from Salesforce CRM are stored under your account on the Amazon S3 servers. Neither InSitu Software nor Salesforce.com has any direct knowledge of or access to this account. For an organization, only one S3 account can be used with iTools File Cabinet.

S3 Bucket

Simply put, an Amazon S3 bucket is the base level grouping of files for an account, similar to a hard drive on your computer or USB drive in your pocket. With cloud computing, storage is shared among millions of users, so instead of a single letter identifier, such as c:, a globally unique name for each bucket must be used. There are a few rules you need to follow when creating a globally unique bucket name. These rules are provided in the **Create S3 Bucket(s)** section located later in this guide. A maximum of 100 buckets can be created for each account.



S3 Buckets are analogous to iTools File Cabinets in Salesforce. Therefore, each S3 Bucket must be created for and matched with a single iTools File Cabinet in Salesforce.

S3 Folders

Just like your local hard drive, multiple folders are created under the root folder to group related files together, making your files easier to find. Otherwise, if all your files were placed in the single root directory, it would become difficult and time-consuming to locate what you need as the number of files grows over time.

Even though Amazon S3 does not natively support a service to organize your files into a hierarchical list of containers like folders and sub-folders, the S3 file management tools make it appear as if it does. Using one of these tools, you can create folders in your buckets to better organize your files. For example, to make all your marketing materials available to your Salesforce CRM users, you could set up a single Marketing bucket with folders for the different types of materials. Creating separate folders for Brochures, Data Sheets, Advertisements, Customer Testimonials, Presentations, Templates, Logos, etc. makes it very easy for your users to locate the particular marketing file they need.

Unlike S3 Bucket names, folder names do not have to be globally unique. And, the naming rules are a lot less restrictive. Many of the Amazon S3 management applications allow you to create a nested set of folders, just like the file system on your computer. Currently, iTools File Cabinet only supports a single level of folders beneath the 'root' bucket. Keep this in mind as you create the buckets and folders in S3.

iTools File Cabinet Components

iTools File Cabinet groups the files in your Salesforce CRM environment using the same two-level structure you set up in S3. Instead of *Buckets* and *Folders*, iTools uses *File Cabinets* and *Drawers* with a graphical presentation that makes it real easy for users to navigate.

File Cabinets

iTools File Cabinets are created and managed within Salesforce CRM. Each File Cabinet represents or is 'mapped to' one bucket in your S3 account. With iTools, you can give your File Cabinets descriptive names to represent the files contained within them - there are no complex rules for File Cabinet names. The File Cabinet also controls which users are permitted to access those files. From a technical perspective, an iTools File Cabinet is a custom object that stores information used to display and control access to the container and its associated files.

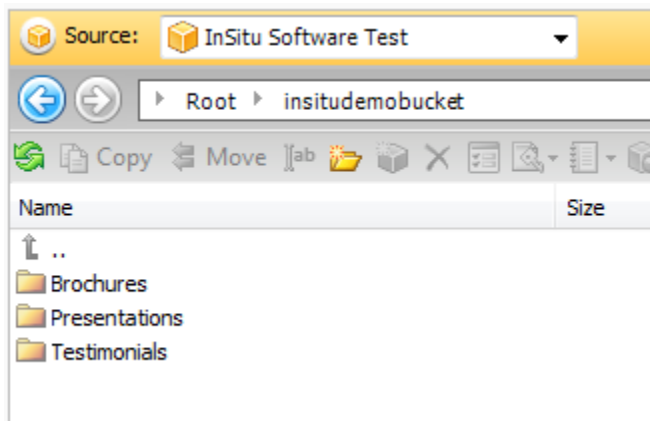


File Cabinet Drawers

Creating File Cabinet Drawers is easy and automatic. Unlike a File Cabinet, you do not need to do anything in Salesforce CRM to make a drawer appear in the iTools File Cabinet user interface. Simply create a “folder” directly under the root of an S3 bucket and the folder will automatically appear in the drop down list of drawers on the File Cabinet page.

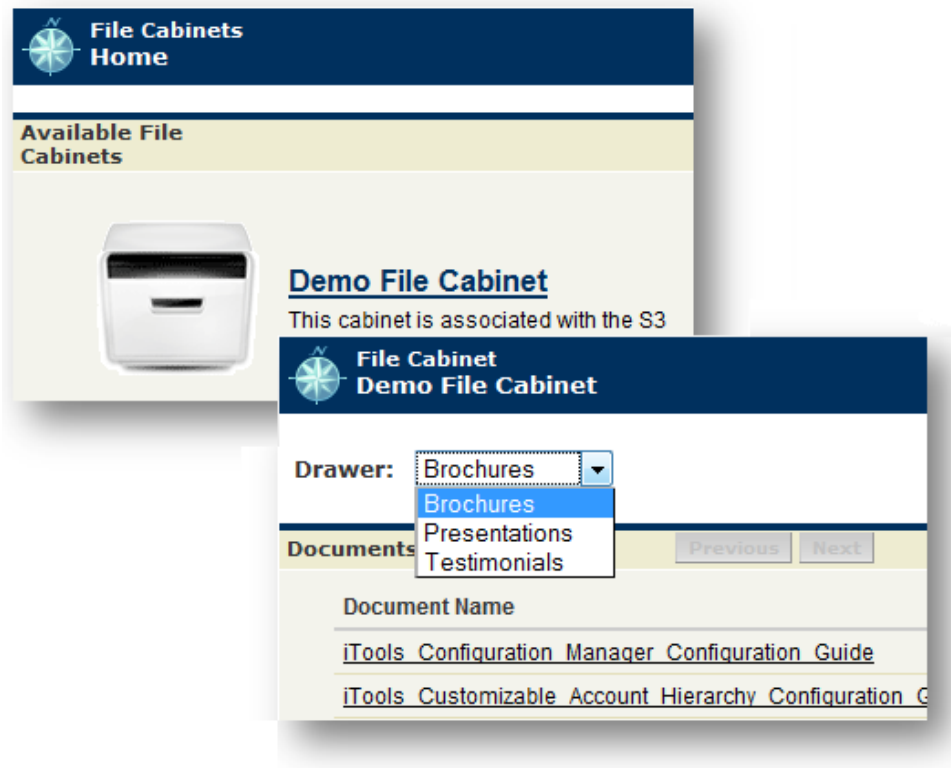
For example, if the S3 bucket **insitudemobucket** were associated with the iTools File Cabinet named **Demo File Cabinet**:

The S3 Configuration would look like this:





The iTools File Cabinet would look like this:



Distributing Files to Salesforce CRM Users

iTools File Cabinet provides an easy, seamless way for your users to open or download files directly from Salesforce CRM. It is typical in many companies to have files created by various departments and groups, many of which may not have Salesforce CRM licenses for their personnel. The iTools File Cabinet solution bridges the gap, allowing Salesforce CRM users to access files created and managed by others that are not Salesforce CRM users. With S3 as the file storage provider, you no longer need to be concerned with file sizes or file storage limits

File distribution is accomplished using your S3 file management tool which provides the operations you need to copy files to the proper buckets and folders on S3. Many companies instruct the people who will be responsible for creating the files and organizing the folders to use the S3 file management tools to copy the files to S3. Other companies instruct their users to copy files to designated locations on their network file servers and then use 3rd party tools to sync those files up to their S3 account. Either way, the users who create and copy files to S3 do not need to be a Salesforce CRM user.

Salesforce CRM users access the files from S3 by simply clicking on the file name in a list produced by the iTools File Cabinet tool. They should not and need not be aware of where the files are located and the technology used to access them.



Configuring iTools File Cabinet

Now that iTools File Cabinet is installed and you have a basic understanding of components that make up the File Cabinet solution, there are a few simple configuration tasks which must be completed before you can begin to use the tool.

AWS Credentials

iTools File Cabinet integrates with an Amazon S3 account owned and configured by your organization. All files made available to your organization from Salesforce CRM are stored under your account on the Amazon S3 servers. Neither InSitu Software nor Salesforce.com has any direct knowledge of or access to this account. Amazon provides an Access Key Id and Secret Access Key for access to its services, like S3. To establish the proper communication between iTools File Cabinet and Amazon S3, the value of the Access Key Id and Secret Access Key must be provided in the appropriate iTools configuration settings.



You must have an Amazon S3 account to use iTools File Cabinet. If your organization does not have an S3 account, you can easily set one up from this webpage:

<http://aws.amazon.com/s3/>

Locate the security credentials to your organization's S3 account. Specifically, you will need the Access Key Id and the Secret Access Key values. The Amazon keys are both fairly long strings of characters sent to you from Amazon. Your values will be similar to this example:

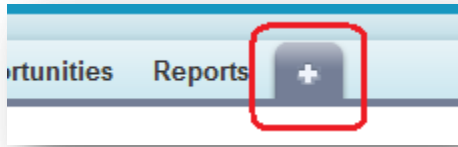
Access Key ID: **ALIAJ6CK4ATXPXLE1ABA**

Secret Access Key: **QKZv/i6c0rVrTDy+guMo1aO3FzfxDhk2Ma4Xc7d1**

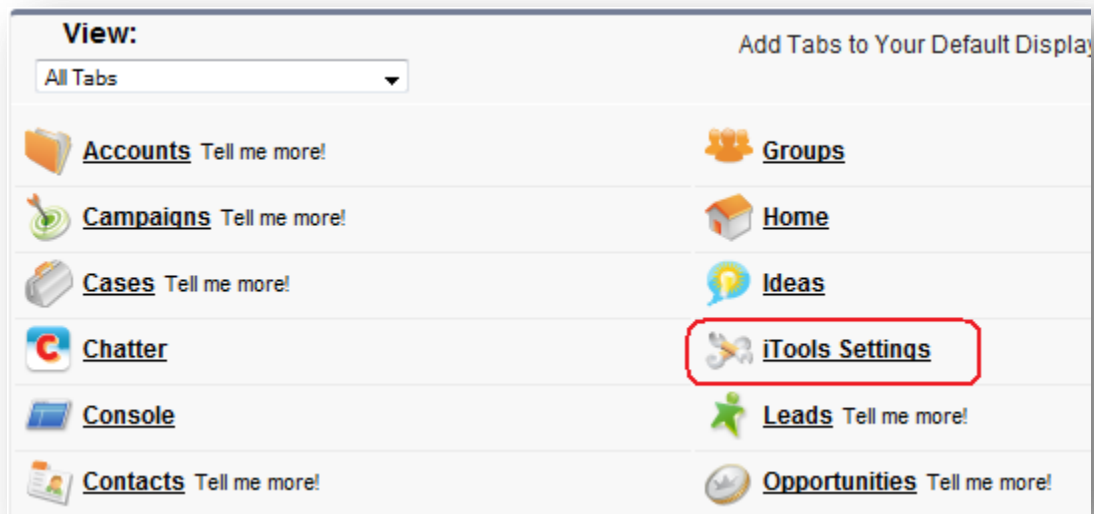
Both values for your account must be entered into the appropriate iTools Setting. The following instructions will guide you through this process.



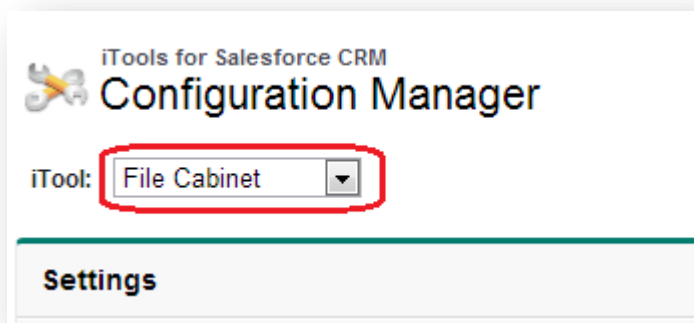
1. Access the list of all tabs by clicking on the right-most tab (the one with the little plus sign).



2. Locate the tab labeled **iTools Settings** and click on the link.



3. Select File Cabinet in the **iTool** drop down list.





4. Click the setting labeled **AWSCredentials**.

Feature	Setting	Value
Administration	ModifyAllRequired	Y
AWS Credentials	AWSCredentials	<Edit Se
View	HomePageLayout	Small Ic
	FilesPerPage	25

5. Click the **Edit** button at the top of the page.

iTools Setting
AWSCredentials

[<<Back to iTools Configuration Manager](#)

Value for All Users

Value	<Edit Setting to View/Change Credentials>
Description	Access Key ID and Secret Access Key of the Amazon Web Services (AWS) account owned by your organization.



6. Enter your Access Key ID and Secret Access Key for your S3 account into the appropriate fields and click on the **Save** button.

iTools Setting Edit: AWSCredentials
Value for All Users

Settings

Access Key ID

Secret Access Key



Amazon S3 credentials are case sensitive and must be entered exactly as they are shown on the Amazon site or the email sent to you from Amazon. Switching even one character from upper case to lower case or vice versa will prevent iTools File Cabinet from being able to access your account.



Create S3 Bucket(s)

Each iTool File Cabinet must be associated with an Amazon S3 bucket. You must create an S3 bucket with your S3 file management tool before you can associate it with an iTools File Cabinet. Bucket names must be globally unique, meaning that you must choose a name for your bucket that has not been used by any other Amazon S3 user. Since organization domain names are also globally unique, it is common practice to use your organization domain name as part of your bucket name. Typically, your domain name is placed at the end of the bucket name. For example, **marketing.mycorp.com** would be an acceptable name for a bucket that is used to contain the latest marketing materials available to your sales team. Global uniqueness is only one of the rules that must be followed when creating a name for your bucket. There are also a few other rules that are just as important. Although these rules may not be enforced by your S3 management application, they are critically important and must be followed in order for your bucket to operate properly with iTools File Cabinet.

Rules for S3 Bucket Names

- Can only contain lowercase letters, numbers, periods (.), and dashes (-).
 - iTools File Cabinet will **not** be able to access a bucket if the name contains any uppercase letters.
 - Spaces are not allowed in the bucket name.
- Must start with a number or letter.
- Must be between 3 and 63 characters long.
- Cannot use an IP address style or format (e.g., "192.168.5.4").
- Cannot end with a dash.
- Cannot contain dashes next to periods (e.g., "my-.bucket.com" and "my.-bucket" are invalid)



Once a bucket has been created, you cannot change the name. If you created a bucket with a name that does not adhere to the S3 Bucket rules, you should delete it and create a new one with a proper name.



If you intend to use the encryption option for more secure downloads, your bucket name must **not** include periods.



Bucket Location

The Amazon S3 service is hosted in a number of data centers located throughout the world. When creating a new bucket you must decide in which location of the S3 service you want the bucket to be hosted. Buckets hosted closer to users will have smaller latency and faster performance.

If you host all of your buckets in the US Standard location Amazon will automatically store your files in either its Northern Virginia or Pacific Northwest data center and no additional configuration of Salesforce is required. If however, you choose a different location option for your buckets you will need to add the URL of that location's S3 service to your Remote Sites Settings.

The URL to the US Standard location was added when you installed iTools File Cabinet. To add the URL for other locations follow the instructions outlined in the Add Remote Site(s) section below.

To create a S3 bucket, you must use an Amazon S3 management application, such as **Cloudberry Explorer for Amazon S3**. Follow the instructions provided by the application and remember to type in a properly formatted name.



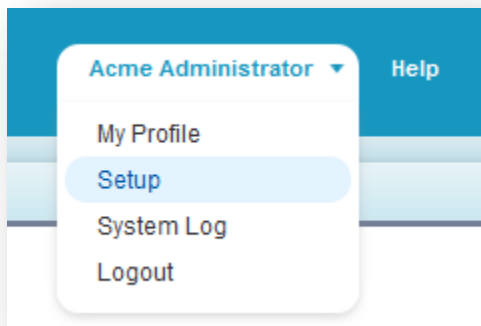
Amazon has a limit of 100 buckets for each S3 account. This is not an issue for iTools File Cabinet. However, if your organization uses one S3 account for multiple purposes, including iTools, you should make sure the total number of buckets does not exceed the 100 bucket limit. If your organization has multiple S3 accounts, you can only choose one of those accounts to use with iTools File Cabinet.



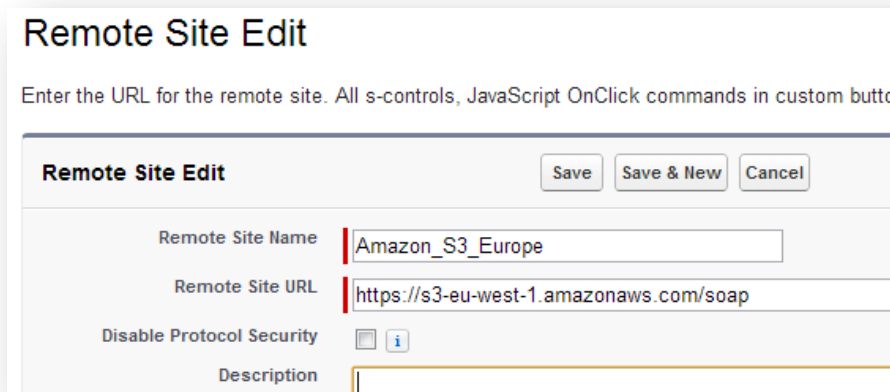
Add Remote Site(s)

A Remote Site must be added to your Salesforce configuration for every Web address accessed by iTools File Cabinet. The address for the US Standard Amazon site was added when the File Cabinet package was installed. If you choose to host any of your S3 buckets on any other location you must add a Remote Site entry for the service at that location. Follow the instructions below to add an additional Remote Site to your Salesforce org:

1. Access the setup area by clicking the **Setup** link at the top of any Salesforce CRM page.



2. Access the Remote Site Settings by going to **Security Controls > Remote Site Settings** in the Administration Setup area.
3. Click on the **New Remote Site** button located above the list of existing approved remote sites and fill in the appropriate information.





The value you enter for the **Remote Site Name** can be any value you like so long as you can identify the purpose of the Remote Site and it meets the Salesforce naming requirements. The **Remote Site URL** value is, however, very important and must be entered exactly as follows depending on which Amazon location(s) you are using.

Location	Remote Site URL value
US West (Oregon)	https://s3-us-west-2.amazonaws.com /soap
US West (Northern California)	https://s3-us-west-1.amazonaws.com /soap
EU (Ireland)	https://s3-eu-west-1.amazonaws.com/soap
Asia Pacific (Singapore)	https://s3-ap-southeast-1.amazonaws.com /soap
Asia Pacific (Sydney)	https://s3-ap-southeast-2.amazonaws.com /soap
Asia Pacific (Tokyo)	https://s3-ap-northeast-1.amazonaws.com /soap
South America (Sao Paulo)	https://s3-sa-east-1.amazonaws.com /soap

4. Save the new Remote Site. Repeat for each unique Amazon location you intend to use with iTools File Cabinet.

Create S3 Folder(s)

The Amazon S3 service has similar features to your computer file management system; however, it does not provide a mechanism to organize your files into a hierarchical list of containers like folders and sub-folders. Fortunately, the folder/sub-folder method of organizing files is such a common interface for computer users that most, if not all, of the popular S3 file management applications provide a way to create what appear to be folders that you can use to group your files. Unlike bucket names, these folder names can contain upper case letters and spaces.

To create an S3 folder, you must use an Amazon S3 management application, such as **Cloudberry Explorer for Amazon S3**.



Many of the Amazon S3 management applications allow you to create a nested set of folders, just like the file system on your computer. Currently, iTools File Cabinet only supports a single level of folders beneath the 'root' bucket. Keep this in mind as you create the buckets and folders in S3.



Add Files to S3

When files are added to buckets and folders on your S3 account, they are instantly made available to you in the iTools File Cabinet. There is no limit to the number of files that can be included in a bucket or folder. However, be sure to carefully consider how many files you place in the root of a bucket (file cabinet) and how many are in each folder. A bucket or folder with too many files will make it difficult for users to locate a particular file and potentially require a user to page down multiple times to find a file that appears near the end of the list.



It is a recommended best practice to delay the upload of files to S3 until after the S3 buckets and folders have been created and tested with the iTools File Cabinet. This way you can verify the accuracy of the bucket and folder names and correct any errors on the spot. This will eliminate the need to move files to new locations if a bucket or folder name is incorrect or the structure needs to be modified.

File Cabinet Administration

The iTools File Cabinet combines Salesforce permission settings with its own iTools Settings to provide a flexible and easy way to administer access rights for the iTools File Cabinets. First, you need to determine which users need administrative access to the File Cabinets and which users do not.

Administrative access to iTools File Cabinets allows a user to perform actions that impact the display and usability of the feature for all users. Users with administrative access will be able to add, edit, delete and modify security for the File Cabinet objects. With that in mind, a user with administrative access should also be very knowledgeable about the features and configuration options available in both iTools and Amazon S3. In addition, the user should have full access to your organization's S3 account as well as all File Cabinets and files associated with them.

iTools provides the following two options for assigning administrative access:

1. Give administrative access only to those users with **Modify All Data** permission.

As the default security configuration, this option is the easiest to manage and the only option available to sites using the Professional Edition of Salesforce CRM. However, it is the most restrictive option as only the System Administrator(s) will be given administrative access to the iTools File Cabinets. To enable this option, leave the **ModifyAllRequired** iTools Setting set to Y(es).

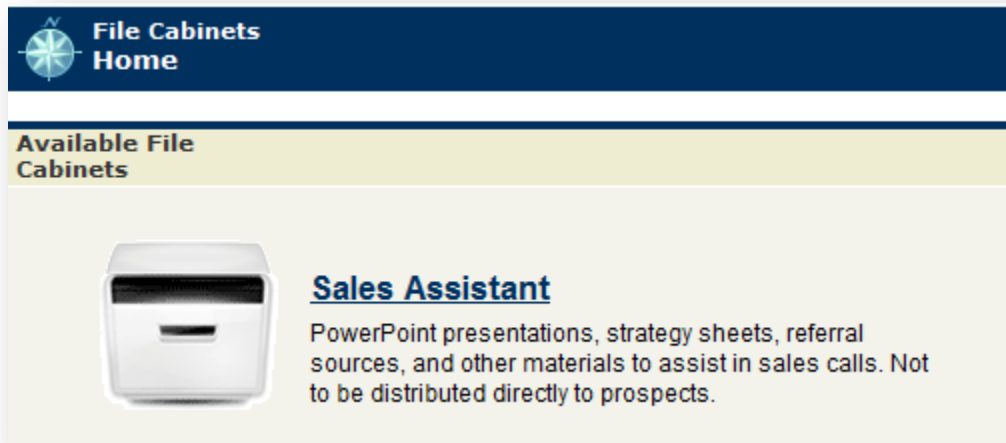
2. Give administrative access to all users with **Create** permission on the File Cabinet custom object.



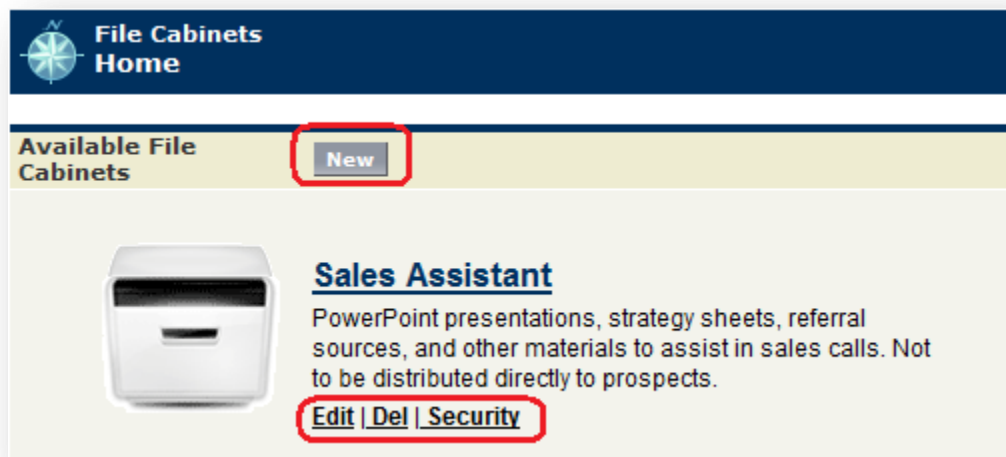
If it is important for users other than System Administrators to be given administrative access to the iTools File Cabinets, then change the **ModifyAllRequired** iTools Setting value N(o). In addition, the **Create** permission on the File Cabinet custom object on all your user profiles must be updated. Users whose profile gives them permission to Create File Cabinet objects will see the **New** button and the **Edit | Del | Security** links on the File Cabinet home page.



Users without administrative access to the iTools File Cabinets will see:



Users with administrative access to the iTools File Cabinet will see:



Users do not need to have administrative access to iTools File Cabinet in order to upload to and delete files from your S3 account. To perform these actions, a user must have the credentials to access your S3 account and an Amazon S3 management application to execute the operation.

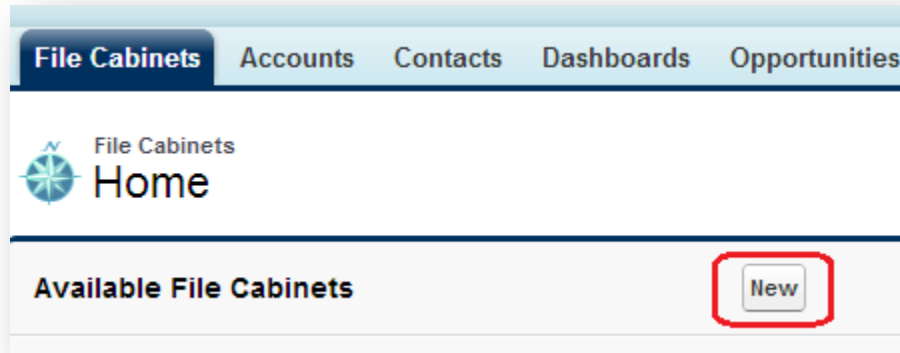
See the iTools Settings Section later in this Configuration Guide for additional information concerning this setting.



Create File Cabinet(s)

To make files in an Amazon S3 bucket available from within Salesforce CRM, you need to create an iTools File Cabinet and map it to the S3 bucket. To create an iTools File Cabinet, follow these quick and easy instructions:

1. Access the File Cabinets home page by clicking on the File Cabinets tab.
2. Click on the **New** button at the top of the page.



If you do not see the **New** button at the top of the page, your Salesforce CRM account has not been set up with administrative access to iTools File Cabinet. See the **File Cabinet Administration** section of this guide to learn more about administrative access to iTools File Cabinets.

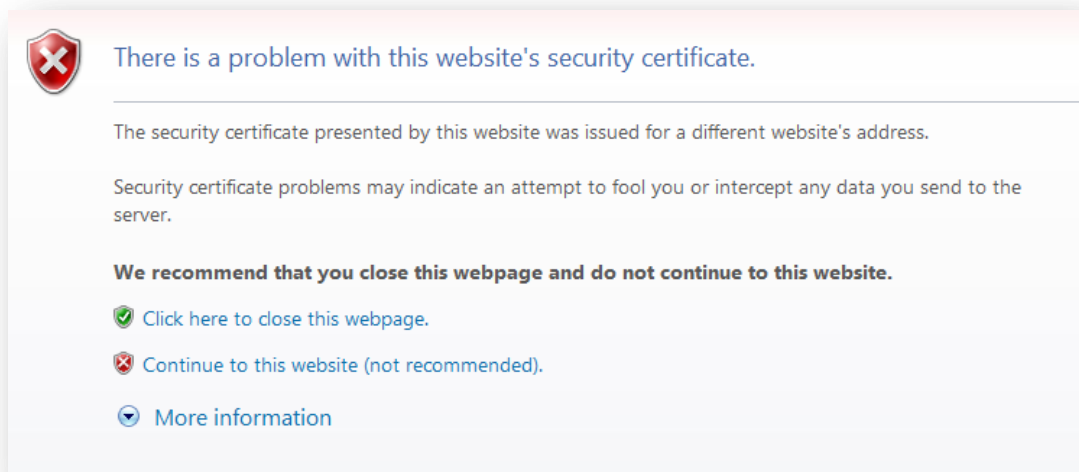
3. In the field labeled **File Cabinet Name**, enter the name you want displayed for the File Cabinet on the File Cabinets home page.
4. In the field labeled **Amazon S3 Bucket**, enter the name of the S3 bucket in which the files for this File Cabinet will be stored. See the **Create S3 Bucket(s)** section of this guide for more details about Amazon S3 buckets.
5. In the field labeled **Bucket Location**, select the name of the Amazon server location on which you created the S3 bucket.



6. In the field labeled **Description**, enter a short explanation of the type of files a user will find in this File Cabinet.
7. In the field labeled **Display Order**, enter a numeric value to control where in the list of available File Cabinets this new cabinet will appear. Cabinets with smaller Display Order values appear at the top of the list; those with larger numbers display at the bottom. If two or more File Cabinets are given the same Display Order value, their order of appearance will be determined alphabetically based on the File Cabinet Name.
8. The **Files in the Root** checkbox should be checked if you plan to place files in the “root” of the S3 bucket. If all of the files associated with the File Cabinet are to be placed in folders within the bucket, then this checkbox should be left unchecked.
9. The **Encrypt Files During Retrieval** checkbox indicates if files should be encrypted before being transported over the internet from the Amazon S3 site to your user’s computer. If this checkbox is checked, all files in this File Cabinet will be downloaded using the Secure Sockets Layer (SSL) security protocol. This option will increase security but will also increase download times.



If you do intend to encrypt files when downloading and your users use Microsoft Internet Explorer, be sure to create your S3 buckets with **no** periods in the name. You will also need to instruct your users to add s3.amazonaws.com to their list of trusted sites. Failure to properly name your S3 bucket or add the S3 site to the list of trusted sites can result in a message similar to the following:





10. Click on the **Save** button.


The screenshot shows a dialog box titled "File Cabinet Edit" with a sub-header "Marketing Materials". The dialog has a header bar with three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red rectangle. Below the header is an "Information" section with the following fields:

- File Cabinet Name: Marketing Materials
- Amazon S3 Bucket: marketing.mycorp.com
- Bucket Location: US Standard (dropdown menu)
- Description: Marketing materials including brochures, ads, data sheets, and customer testimonials. Information (text area)
- Display Order: 2
- Files in Root:
- Encrypt Files During Retrieval:





At the bottom of the dialog, there are three buttons: "Save", "Save & New", and "Cancel".

11. Information for the new File Cabinet will now display in the native Salesforce CRM detail page. At this point, you can select the Sharing button to set the sharing rights for the new iTools File Cabinet. However, if your S3 bucket is not fully populated and not tested with the new iTools File Cabinet, we recommend you skip this step and return to the File Cabinets home page by clicking on the File Cabinets tab. Sharing can always be set at a later time by using the Security link located next to each File Cabinet on the File Cabinet home page.



 File Cabinet
Marketing Materials

File Cabinet Detail Edit Delete Clone Sharing

File Cabinet Name	Marketing Materials
Amazon S3 Bucket	marketing.mycorp.com
Bucket Location 	
Description	Marketing materials including brochures, ads, data sheets, and customer testimonials. Information in this cabinet can be freely shared with prospects.
Display Order 	10
Files in Root 	<input type="checkbox"/>
Encrypt Files During Retrieval 	<input type="checkbox"/>
Created By	<u>SFC Developer</u> , 11/9/2009 2:32 PM

Edit Delete Clone Sharing

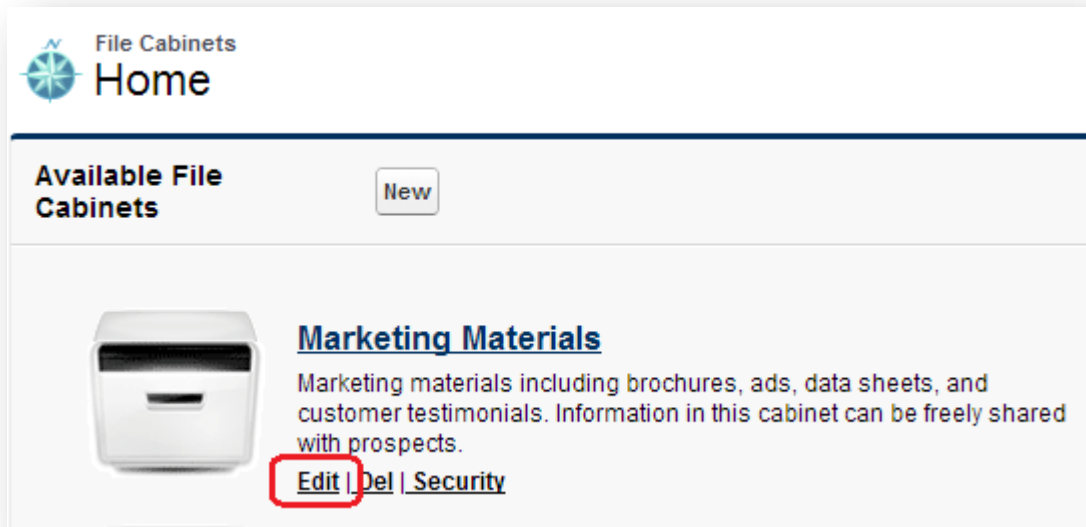
Edit File Cabinet

All iTool File Cabinet attributes can be changed after the File Cabinet has been created. To edit a File Cabinet, follow these quick and easy instructions:

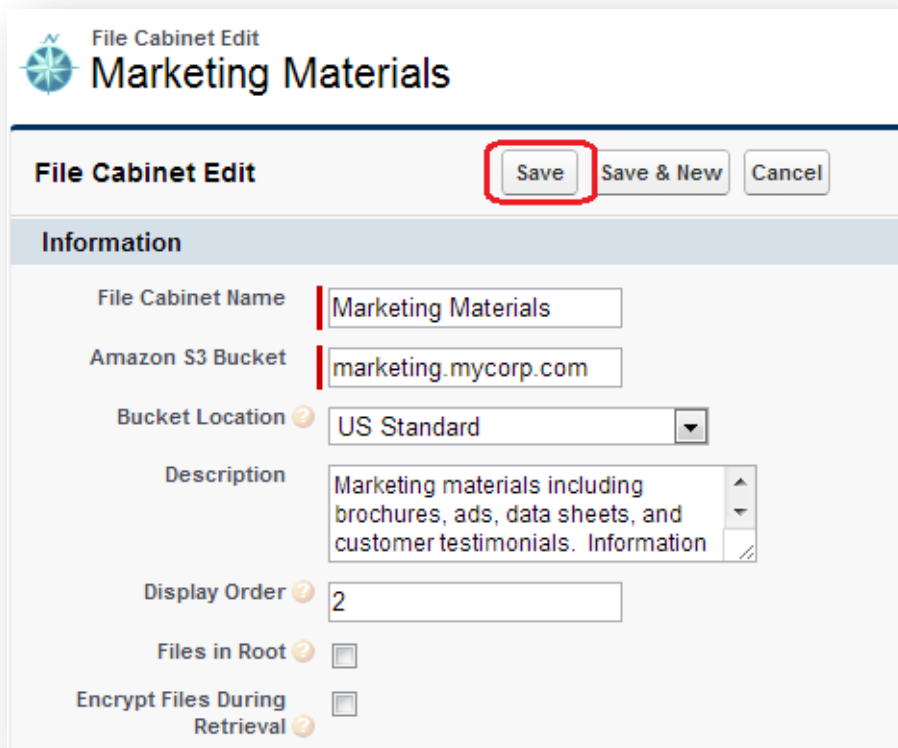
1. Access the File Cabinets home page by clicking on the **File Cabinets** tab.



2. Click on the **Edit** link next to the individual File Cabinet you want to edit.



3. Make your changes and click on the **Save** button.





Delete File Cabinet

iTools File Cabinets can be deleted from your Salesforce CRM environment if they are no longer needed. To delete an existing File Cabinet, follow these instructions:

1. Access the File Cabinets home page by clicking on the **File Cabinets** tab.
2. Click on the **Del** link next to the individual File Cabinet you want to delete.
3. Click on the **Yes** button on the confirmation prompt.



Deleting an iTool File Cabinet record will have no impact on the corresponding S3 bucket or any files in that bucket. You must use your Amazon S3 management application to delete the S3 bucket and files from your Amazon S3 account.

File Cabinet Security

The Salesforce CRM Sharing model is used to control the display of the iTools File Cabinets and the files stored in its associated S3 location. The iTools custom object, File Cabinet, is configured to use the **Private** sharing model so that users will not have access to the File Cabinet or its contents until access is specifically granted to them. This model provides you the flexibility you need to create File Cabinets whose contents should only be accessible to a limited set of users or groups. It also allows you to create, configure, populate and **thoroughly test** the File Cabinets before users are able to see or access them.

An iTools File Cabinet administrator can set the Sharing rights for a specific File Cabinet in the following manner:

1. Access the File Cabinets home page by clicking on the **File Cabinets** tab.
2. Click on the **Security** link next to the individual File Cabinet whose sharing rights you want to change.



The screenshot shows the 'File Cabinets Home' page. Under 'Available File Cabinets', there is a 'Sales Assistant' cabinet. Below its name is a description: 'PowerPoint presentations, strategy sheets, referral sources, and other materials to assist in sales calls. Not to be distributed directly to prospects.' At the bottom of the cabinet entry, there are links for 'Edit', 'Del', and 'Security'. The 'Security' link is highlighted with a red box.

- 3. Use the standard Salesforce CRM Sharing Detail page to Add and Del the rights for individuals and groups.

The screenshot shows the 'Sharing Detail' page for 'Sales Assistant'. It includes a 'View:' dropdown set to 'All' and a navigation bar with letters A-Z and 'Other'. Below is a table titled 'User and Group Sharing' with columns for Action, Type, Name, Access Level, and Reason.

Action	Type	Name ↑	Access Level	Reason
	User	SFC Developer	Full Access	Owner
Edit Del	User	SFC Standard	Read Only	Manual Sharing



You cannot grant an individual user or group of users edit permission to a File Cabinet simply by granting them Read/Write permission. Users must be iTools File Cabinet administrators in order to access the File Cabinet edit page.



Licensing

iTools File Cabinet uses the Salesforce CRM package licensing mechanism to control which users have access to its functionality. A user will only have proper access to File Cabinet if they have been assigned a license to **both** iTools File Cabinet **and** the iTools Configuration Manager.

Assignment of the File Cabinet licenses determines which users will see the File Cabinets tab. Users who do not have a File Cabinet license assigned to their account simply do not see the tab anywhere. Your organization was given a large number of File Cabinet licenses when the package was installed. This number is not necessarily the number of users that can be granted File Cabinet functionality because the tool also requires the assignment of an iTools Configuration Manager license.

A license to the iTools Configuration Manager package is required for a user to have access to the File Cabinet iTOL as well as all other iTools. Your organization receives one Configuration Manager license for every iTools subscription it purchases. Users that have not been assigned a Configuration Manager license may see the File Cabinets tab but it will not operate correctly.

InSitu Software uses the multiple package license approach to make it possible for customers to purchase iTools subscriptions for many, but not all of their users. While we believe an iTools subscription for all Salesforce CRM users is a valuable investment, we understand that such a decision is best left to the organization itself.

It is important for you, the System Administrator, to understand how license allocation for both Configuration Manager and File Cabinet will impact your users. The information in the following sections should help with that understanding:

Users that Have: License to both Configuration Manager and File Cabinet

- User will see and be able to use the **File Cabinets** tab.
- NOTE: If your organization is purchasing an iTools subscription for every user and would like to make the features of File Cabinet available to every user, InSitu Software can configure your licensing such that every user is automatically granted a File Cabinet license. This will eliminate the administrative task of assigning File Cabinet licenses to users. Please contact InSitu Software at support@insitusoftware.com if you are interested in this option.

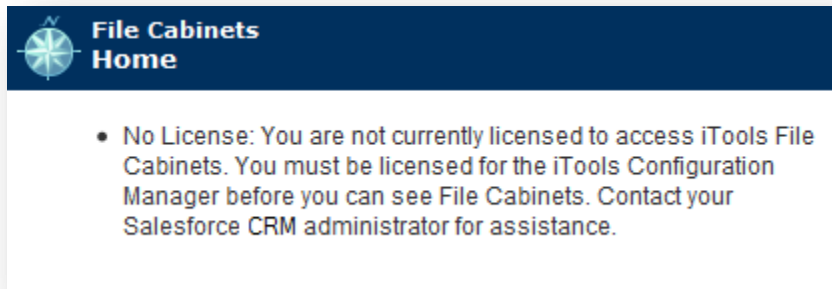
Users that Have: License to Configuration Manager Only

- The user will **not** see the **File Cabinets** tab. It will not appear on either the main or All Tabs view.



Users that Have: License to File Cabinet Only

- The user will be able to see the **File Cabinets** tab on the main and All Tabs view. However, if they access the tab, the following message will display instead of the list of available file cabinets:



The assignment of a File Cabinet license to a user account that does not have a Configuration Manager license is considered a configuration error and should be corrected as soon as possible.

Users that Have: No License to Configuration Manager or File Cabinet

- The user will **not** see the **File Cabinets** tab. It will not appear on either the main or All Tabs view.



iTools Settings

All iTools, including File Cabinet, include a set of iTools Settings. These settings control the behavior of the iTool and can be modified to meet your organization’s specific needs. All iTool Settings are viewed and edited using the iTools Configuration Manager. To access the settings for iTools File Cabinet, click on the iTools Settings tab which will take you to the iTools Configuration Manager home page. Then, select File Cabinet Management in the iTool drop down list.

The screenshot shows the 'iTools for Salesforce CRM Configuration Manager' interface. At the top, there is a logo and the title 'iTools for Salesforce CRM Configuration Manager'. Below this, there is a dropdown menu labeled 'iTool:' with 'File Cabinet' selected. The main content area is titled 'Settings' and contains a table with the following data:

Feature	Setting	Value	Description
Administration	ModifyAllRequired	Y	Modify All Data per
AWS Credentials	AWSCredentials	<Edit Setting to View/Change Credentials>	Access Key ID and account owned by
View	HomePageLayout	Large Icon - One Column	Layout of the cabin
	FilesPerPage	25	Maximum number
	HideFileExtension	Y	Indicates if the file

At the bottom of the interface, there is a section labeled 'iTools Administration' with a button that says 'Manage iTools'.

This section contains detailed information about each of the iTool Settings associated with File Cabinet. It will explain the purpose of each setting and outline the impact of modifying the settings. It will not however, give detailed instructions on how to edit the iTools Settings. These instructions are available in the iTools Configuration Manager Configuration Guide. To view or download the guide, go to the Resources Section of the AppExchange listing for the iTools Configuration Manager.



ModifyAllRequired

The **ModifyAllRequired** setting indicates if a user is required to have the **Modify All Data** permission in order to add / edit / delete or change security on all File Cabinets. It is a good practice to grant such permission to System Administrators only. If it is important that only System Administrators have administrative access to iTools File Cabinets, then leave this value set to Y(es). If it is important to give administrative access to users other than System Administrators, change this setting to N(o). Keep in mind that when **ModifyAllRequired** is set to N(o), the **Create** permission on the **File Cabinet** custom object will be used to determine administrative access to File Cabinets. Initially, all users will have the Create permission, so you need to determine which users should be given administrative access to File Cabinets and update your user profiles accordingly.



If your organization is currently using the Professional Edition of Salesforce CRM, you cannot create new profiles or modify existing ones. Therefore, you should leave the **ModifiedAllRequired** setting set to Y(es). Otherwise, all users will be granted administrative access to all iTools File Cabinets by default.

See the File Cabinet Administration section above for additional considerations for this setting.

AWSCredentials

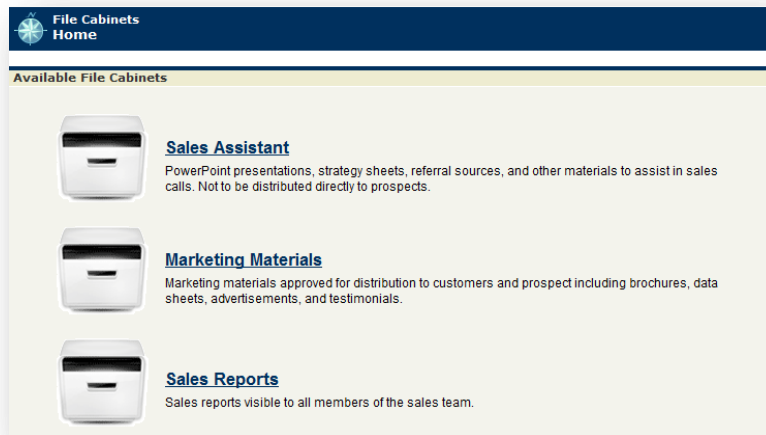
The **AWSCredentials** setting specifies the Access Key Id and Secret Access Key to your organization's Amazon S3 account. Values in this setting are required for the iTool File Cabinet to operate properly. For more details about this setting, see the AWS Credentials section of this guide.

HomePageLayout

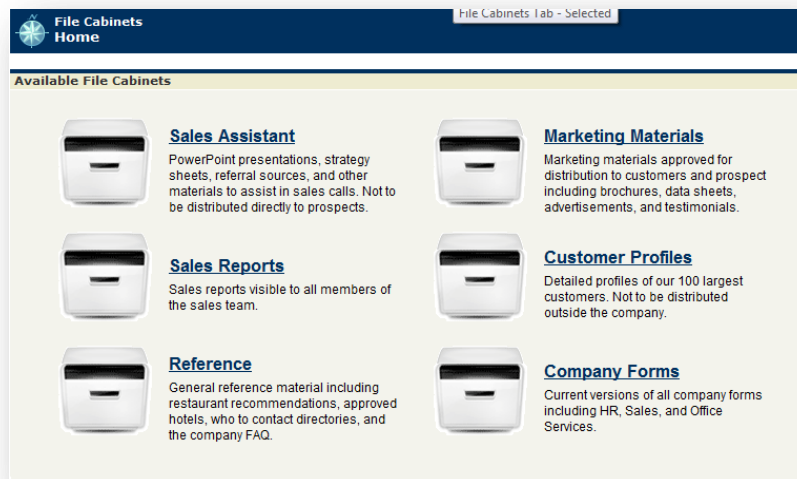
The **HomePageLayout** setting indicates how the File Cabinet home page displays the collection of available File Cabinets. The best layout for your organization will be influenced by the number of available File Cabinets, the size of your user's screens, and your personal preference. There are five options from which to pick: Large Icon – One Column, Large Icon – Two Column, Small Icon – One Column, Small Icon – Two Column and List. If you only have a couple File Cabinets, the **Large Icon – One Column** option works well. If you have a large number of File Cabinets then you may find the **List** option works best for your users. Your choices are:



Large Icon – One Column

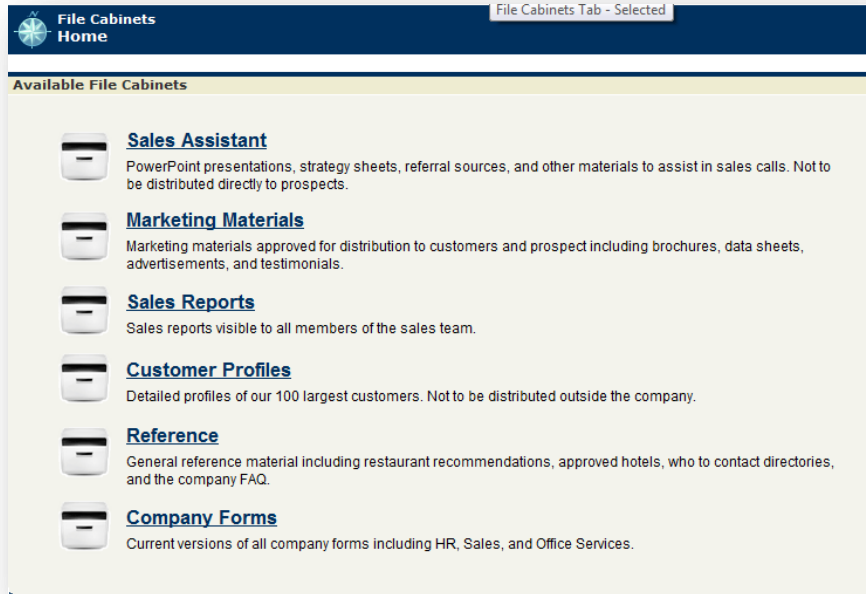


Large Icon – Two Columns

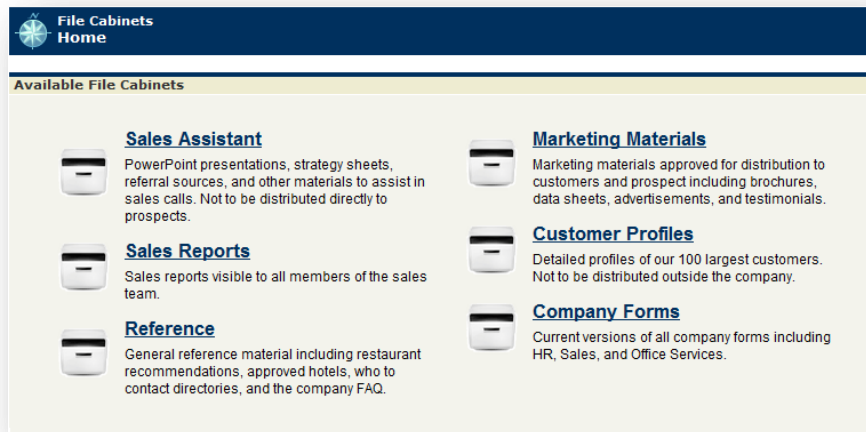




Small Icon – One Column

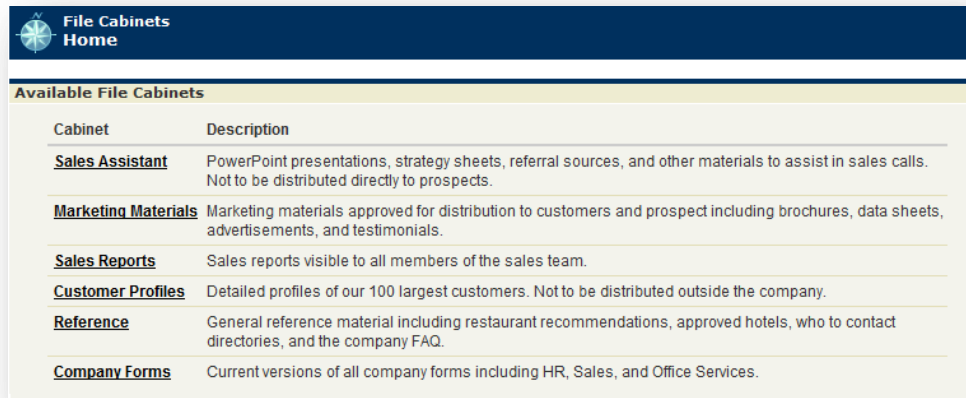


Small Icon – Two Columns





List



Cabinet	Description
<u>Sales Assistant</u>	PowerPoint presentations, strategy sheets, referral sources, and other materials to assist in sales calls. Not to be distributed directly to prospects.
<u>Marketing Materials</u>	Marketing materials approved for distribution to customers and prospect including brochures, data sheets, advertisements, and testimonials.
<u>Sales Reports</u>	Sales reports visible to all members of the sales team.
<u>Customer Profiles</u>	Detailed profiles of our 100 largest customers. Not to be distributed outside the company.
<u>Reference</u>	General reference material including restaurant recommendations, approved hotels, who to contact directories, and the company FAQ.
<u>Company Forms</u>	Current versions of all company forms including HR, Sales, and Office Services.

FilesPerPage

The **FilesPerPage** setting specifies the maximum number of rows included in a “page” of files on the File Cabinet detail page. When more files are displayed on a page, the user will not have to hit the Next button as often in order to find the desired file. However, with more files displayed on a page, it may take slightly longer for the page to load. You should also keep in mind that your users may need to use the scroll bar to get to the Next page button when the value of the setting is above a certain number of rows per page.

HideFileExtension

The **HideFileExtension** setting indicates if the file extension portion of the file name should be hidden when it is displayed in the list of files on the File Cabinet detail page. To hide the file extension, set the value to Y(es). To show the extension, set the value to N(o).



Help and Support

This guide was designed to be a comprehensive resource for the iTools for Salesforce CRM installation and configuration process. We understand that questions and issues can arise and we apologize for any inconvenience this may have caused. To get assistance, ask questions, or simply provide feedback so we can improve this guide, please contact us using one of these methods:

Email: Send us an email at support@insitusoftware.com and we will get back to you as soon as possible. Generally, emails are monitored during our normal business hours, Monday-Friday 9 a.m. to 6 p.m. central time but don't be surprised to hear from us long into the evening or even early in the morning.

Community-Powered Support: We have partnered with Get Satisfaction to provide you with a community based forum in which to ask questions, find answers and discuss our products and services. You can access our Community Forum at <http://getsatisfaction.com/insitusoftware>. Our dedicated InSitu Software team actively monitors the posts so it is likely that you will get a response directly from the engineers who designed and built the products. Once iTools is up and running in your environment, continue to check back with the forum. The knowledgebase is constantly evolving and expanding as we incorporate questions raised by users like you. Perhaps you would even like to share your knowledge with other users.