



iTools File Cabinet Quick Start Guide

About This Guide

This Quick Start guide is designed for Admin users who have prior experience installing and configuring products from AppExchange. An abbreviated set of instructions is provided to quickly get you set up with iTools File Cabinet. A more complete set of step-by-step instructions and supporting information can be found in the iTools File Cabinet Configuration Guide available on our website or AppExchange listing.

About iTools File Cabinet

Take advantage of the incredibly cost effective Amazon S3 storage service and make files available to users in the native Salesforce CRM user interface with iTools File Cabinet. 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. Let the power of cloud computing reduce your internal costs and resource requirements while providing you with the security and accessibility you demand.

Before You Begin

The iTools Configuration Manager is the prerequisite package used for licensing and settings management of all iTools, including File Cabinet. The iTools Configuration Manager version 3.6 or greater must be installed and a license assigned to your account in order for you to install and configure iTools File Cabinet.

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 set one up 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 you use 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.

Installing iTools File Cabinet

1. Begin the installation of **iTools File Cabinet** from AppExchange by using the following link:
<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001gGiiEAE>
2. Click on **Get It Now**.
3. Follow the standard AppExchange instructions including choosing your environment and verifying the Terms and Conditions of the iTools subscription.
4. When prompted to Approve Third-Party Access, click the Yes checkbox to allow File Cabinet to access the Amazon S3 site.
5. When you are prompted to choose the security level, we recommend you select the **Grant access to all users** option, since iTools File Cabinet is valuable to all users.
6. On Step 3 of the Package Installer, click on **Install** to complete the installation. When you have received confirmation that iTools File Cabinet has successfully installed, continue with the next section to configure the iTool for your environment.

Configuring iTools File Cabinet

1. Set up AWS Credentials.
 - 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.
 - Go to the **iTools Settings** Tab.
 - Select File Cabinet in the **iTool** drop down list.
 - Click the setting labeled **AWSCredentials**.
 - Click the **Edit** button at the top of the page.
 - Enter your Access Key ID and Secret Access Key for your S3 account into the appropriate fields and click the **Save** button.
2. Create S3 Buckets and Folders.
 - Use your Amazon S3 management application, such as Cloudberry Explorer for Amazon S3, to create your S3 Buckets and Folders. Follow the instructions provided by the application and remember to type in properly formatted names (e.g. Buckets names can contain only lowercase letters, numbers, no spaces, etc.).



3. Add Files to S3.
 - Use your Amazon S3 management application, such as Cloudberry Explorer for Amazon S3, to add files to the appropriate S3 Buckets and Folders.
4. Create File Cabinets
 - Go to the **File Cabinets** Tab.
 - Click the **New** button at the top of the page.
 - In the field labeled **File Cabinet Name**, enter the name you want displayed for the File Cabinet on the File Cabinets home page.
 - In the field labeled **Amazon S3 Bucket**, enter the name of the S3 bucket in which the files for this File Cabinet are stored.
 - In the field labeled **Description**, enter a short explanation of the type of files a user will find in this File Cabinet.
 - If you plan to place files in the “root” of the S3 bucket, then check the **Files in the Root** checkbox.
 - If you want files in this File Cabinet downloaded using the Secure Sockets Layer (SSL) security protocol, check the **Encrypt Files During Retrieval** checkbox.
 - Click the **Save** button.

Congratulations!

You have successfully completed the steps required to install and configure iTools File Cabinet. Keep reading for tips and information for a successful deployment of iTools File Cabinet.

Tips and Information for a Successful iTools Deployment

iTools 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. Use the Security link next to the individual File Cabinets to set the proper security for your users.



iTools 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. 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. Use the iTools File Cabinet Settings to give administrative access to the appropriate users in your organization.

Learn More about iTools File Cabinet

- The iTools File Cabinet Configuration Guide provides step by step instructions, including screenshots, examples and explanatory text, for a more complete understanding of the features available. Please download and refer to the document to learn how to fully customize the iTool for your organization.
- Additional information can be found on our website at <http://www.insitusoftware.com> and our Get Satisfaction powered Community forum at <http://getsatisfaction.com/insitusoftware>
- Have a comment, suggestion or question? Email us at support@insitusoftware.com.

Explore other iTools in the Collection

- Learn more about each iTool and see how they can make a difference in your organization.
- Visit the AppExchange to install and explore any or all iTools including:
 - ➡ iTools Customizable Account Hierarchy
 - ➡ iTools Delegated Tasks Management
 - ➡ iTools Employment Change Management
 - ➡ iTools Opportunity Status Monitor
 - ➡ iTools State/Country Validation
 - ➡ iTools vCard Creator