FIle Viewer Documentation

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Installation and Setup

To install FlipViewer please use the follow links for the various environments:

[Production/Developer Accounts:]

[Sandbox/Scratch Orgs]

Required Passcode: Xa26Fqdl3b2Wg

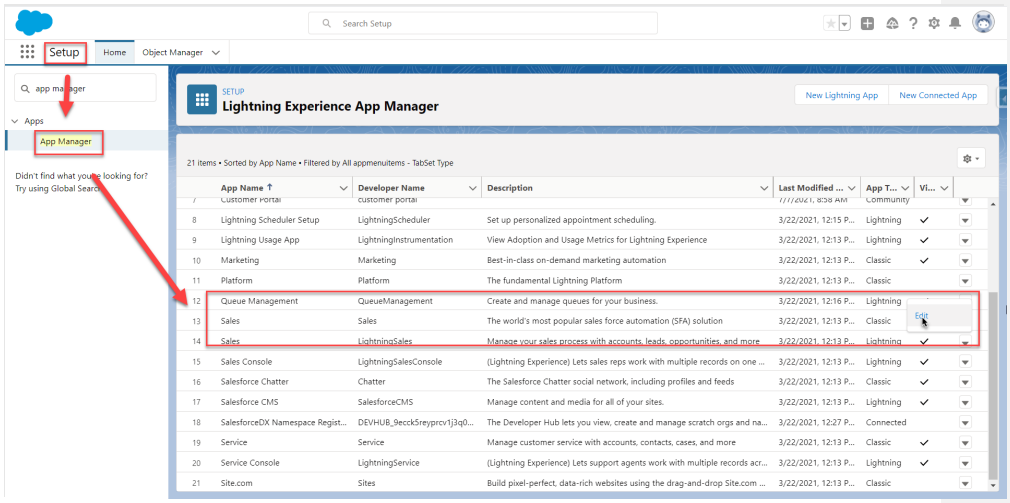
After instillation is complete you will need to do the Follow to allow user to be able to use FileViewer:

- Assign any users who need access the FileViewer Permission set named: File Viewer

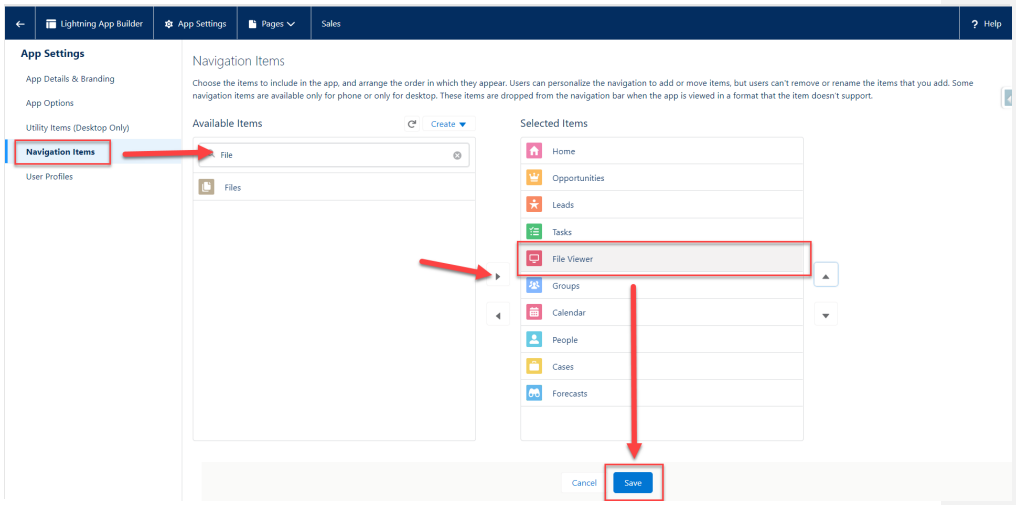
Additional Optional Setup

Assigning the Default Tab to Apps

To add the default File view tab to other Salesforce apps, navigate to Salesforce Setup -> App Manager -> click edit on the app you want to add the tab to.



Once in the App Settings click on Navigation Items and find the File Viewer tab on the left and move it to the right then click save.

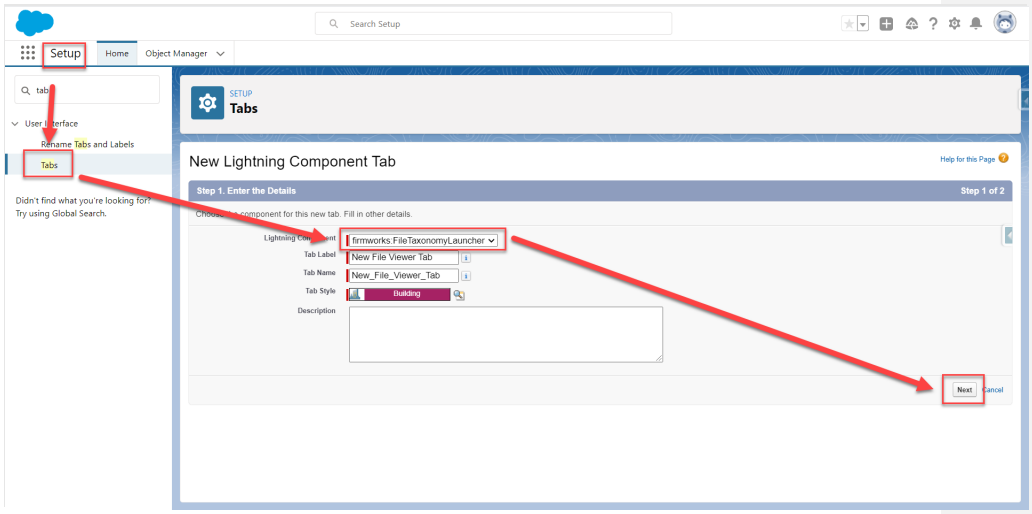

Lightning App Builder
App Settings
Pages
Sales
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
File
Files
Selected Items
Home
Opportunities
Leads
Tasks
File Viewer
Groups
Calendar
People
Cases
Forecasts
Cancel
Save

Creating a new File Viewer Tab

To Create a new File Viewer tab, go to Salesforce Setup -> Tabs -> Lighting Component Tabs. Then Choose one of the two file viewer components that you want to see in the tab, then click next to assign profiles and apps to the new tab.

firrmworks:fileviewer is the Component you see in the Default File Viewer Tab

firrmworks:filetaxonomylauncher is a UI for tagging and uploading new documents. For more please see the Component Overview section of this document.

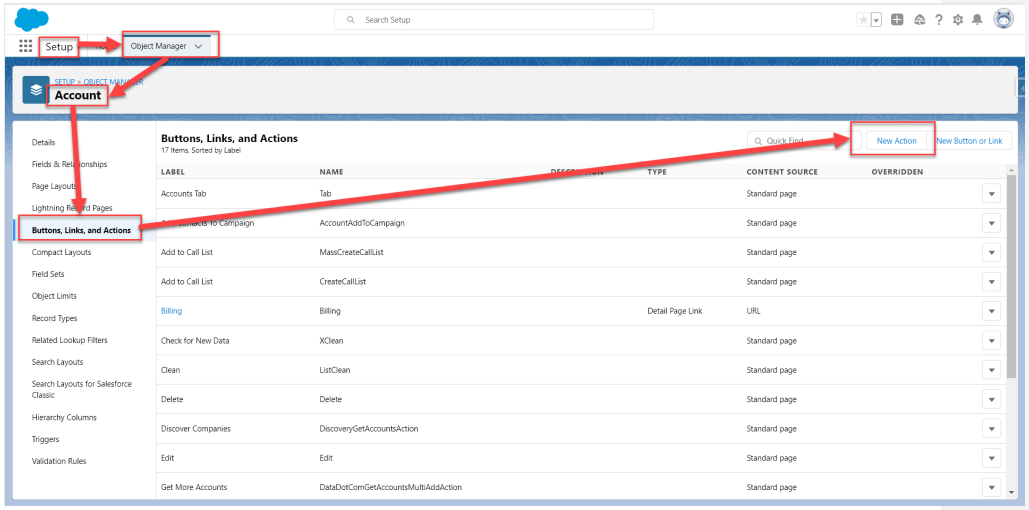


Creating a File Viewer Lightning Tab

TO DO

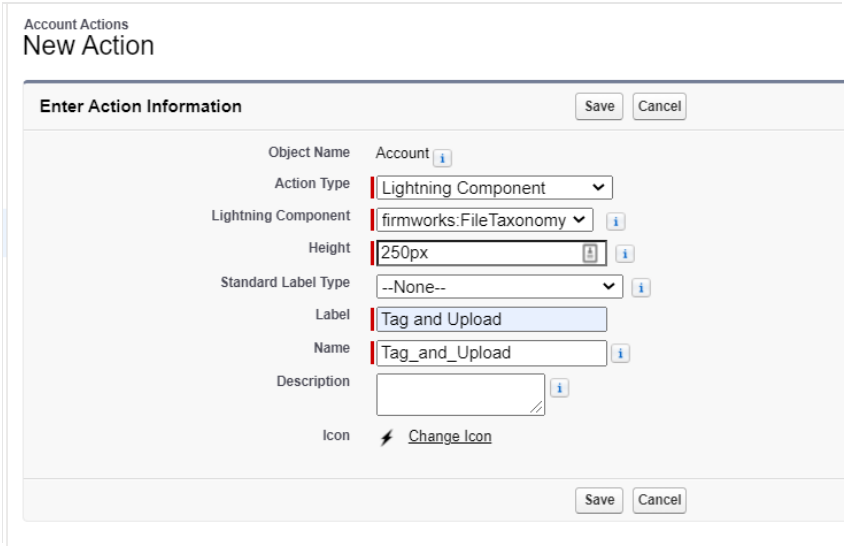
Creating FileViewer Quick Action

If you do not want to use the Global Action Provided out of box by Firmworks you can create a File Viewer Quick Action, go to the Salesforce Setup -> Object Manager -> The object where you want the quick action. Then click New Action



Once in the New Action Creation UI set the Action Type for Lightning Component and the Lightning

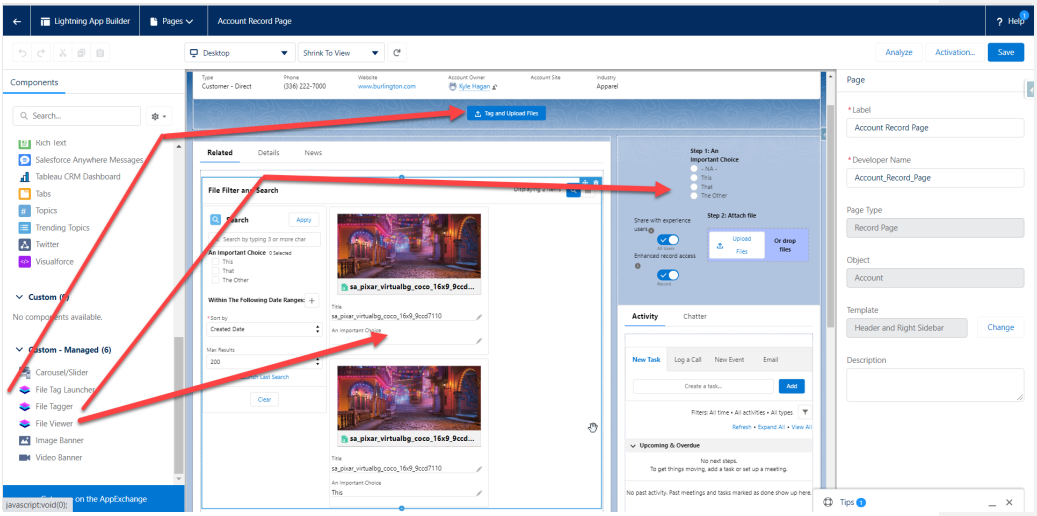
Component to firrmworks:filetaxonomy. You can set the other variables to any values you desire.



Once you save the action add it to the page layout using the Page Layouts section of the Object Manager.

Configurating a record page layout

You can add any of the following components to a page layout



Each Component has a series of Design Options you can use to customize each Component:

File Tag Launcher

1. Setup:
    a. Record Id - This section will allow you to pass in a record idto give the component context do the record page it is on.
2. Button:
    a. Label – The label for the Button
    b. Appearance – This allows you to define the style of the button using SLDS Button Design types.
    c. Horizontal Location - The location of the button across the page
    d. Vertical Location - The location of the button in the from top to bottom
3. Tagger:
    a. Launched Screens Title - The title of the UI component once the button is clicked
    b. Configuration Name – The name of the File Viewer Configurations Metadata record you want to use to source your tag launcher screen
    c. Filter Fields - A comma deiminated list of Content Version fields you want to filter by.
    d. Allowed File Types – a comma delimited list of file types the user is allowed to upload.
    e. Allow Multiple Documents - This box will allow the user to upload multiple documents with oud having to close and reopen the UI.
    f. Tagger Sharing:

i. Show Sharing Options - Toggle this to show or hide all sharing options.
ii. Show Sharing Visibility – Toggle this to show and hide Share with experience Users Toggle
iii. Show Sharing Type – Toggle this show and hide the Enhanced record access toggle.
iv. Sharing Type – This will default the Sharing type regardless of if Show Sharing type is true.
    1. If set to I the toggle will default to Record.
    2. If set to V the toggle will default to Viewer.
v. Sharing Visibility – This will allow you to default the Sharing Options regardless of if Show Sharing Options is true
    1. AllUsers – Defaults the toggle to All Users
    2. InternalUsers – Defaults the toggle to Default

File Tagger

1. Setup:
    a. Record Id - This section will allow you to pass in a record id to give the component context do the record page it is on.
2. Configuration:
    a. Allowed File Types – a comma delimited list of file types the user is allowed to upload.
    b. Configuration Name – The name of the File Viewer Configurations Metadata record you want to use to source your tagger screen
    c. Allow Multiple Documents - This box will allow the user to upload multiple documents with oud having to close and reopen the UI.
    d. Filter Fields - A comma deiminated list of Content Version fields you want to use to tag the File.
    e. Show Sharing Options - Toggle this to show or hide all sharing options.
    f. Show Sharing Visibility – Toggle this to show and hide Share with experience users toggle
    g. Show Sharing Type – Toggle this show and hide the Enhanced record access toggle.
    h. Sharing Type – This will default the Sharing type regardless of Show Sharing type being true.
        i. I - Defaults the toggle to Record.
        ii. V - Defaults the toggle to Viewer.
    i. Sharing Visibility – This will allow you to default the Sharing Options regardless of Show Sharing Options being true
        i. AllUsers – Defaults the toggle to All Users
        ii. InternalUsers – Defaults the toggle to Default

File Viewer

1. Appearance:
    a. Title – The title for the component
    b. Background Color – The rgba Color Designation for the background color of the component
    c. Search Panel Option – Defining default behaviors for Show/Hiding the Search Panel

i. User – Tracks the last state of the panel based on the user's preference
ii. Hidden – Removes the ability to search
iii. On - Toggles search panel on by default
iv. Off – Toggles search panel off by default

2. Configuration:
    a. Record Id – Use this to give context to the component so it only shows records related to the provided record Id.
    b. Name - The name of the File Viewer Configurations Metadata record you want to use to source your viewer screen
    c. Search Objects – Comma delimited list of objects the user can search against
    d. Filter Objects - Comma delimited list of objects the user can filter against
    e. Display Fields - Comma delimited list of content version fields to display
    f. Filter Fields - Comma delimited list of content version fields to filter against
3. Behavior:
    a. Cache Id – If you want the behavior to be different between instances of the file's viewer. Use this variable to a unique variable or name to reference the way you have the component set up in each place. If you have the component set up on the account a very specific, you want to use for every object, use the cache id to not have to setup all the settings again.

Commented [KH1]: @Jordan Pesusich I need help understanding this one better

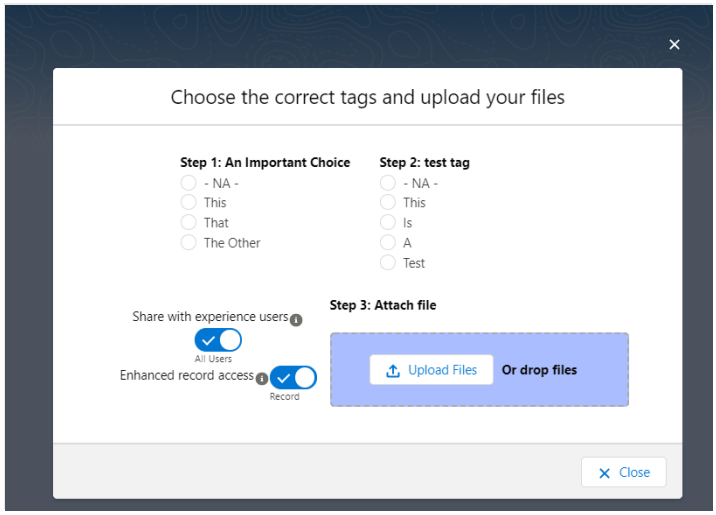
Commented [JP2R1]: Cache Id is used to remember certain options (search on/off, list view) - without setting an id all of the user's choices are globally set. If an arbitrary cache Id of 'a' is set then their choices would pertain only to that component with 'a' - If salesforce provided a unique deterministic id for every component I wouldn't have thought about it.

Commented [KH3R1]: I donno that i quite understand how a cache Id is created. Perhaps explain it to me like I am an admin seeing this for the first time?

Advanced Configurations

Setting Up Tags for the Tag and Upload UI

The FileViewer App will automatically assume any custom field on the Content Version should be used for tagging and will add it to the Tag and Upload UI where it is used.



If you have custom fields, you do not desire to use for tagging or want to change the order they display in the Tag and Upload UI ...

Setting up a File Viewer Configuration Metadata Record

Coming Soon...

Commented [KH4]: @Jordan Pesusich Not sure how to do this is there an example somewhere i can replicate?

Commented [JP5R4]: if using the launcher you can provide the fields to use - if using a quick action would have to create a custom metadata entry for it (I haven't released that piece yet)

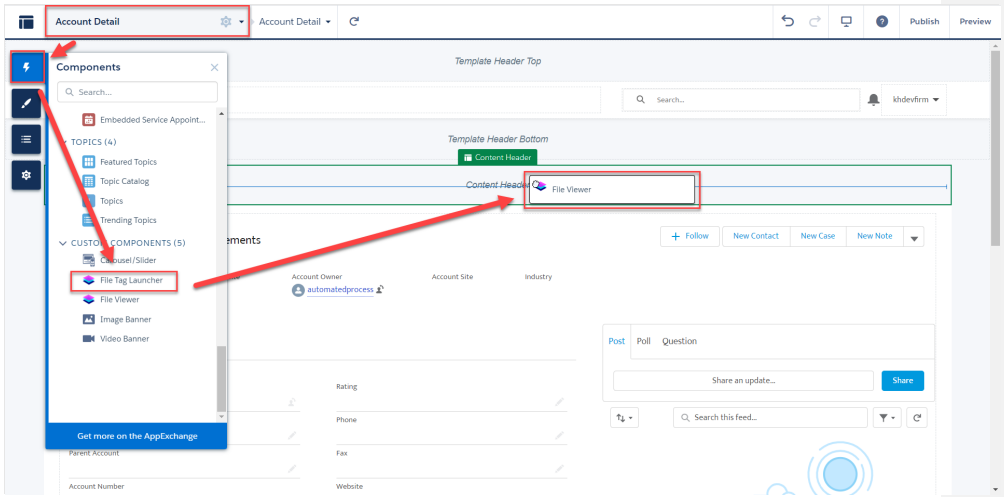
Commented [KH6R4]: I think what i wanted to accomplish with this section was to explain how a person setting this up can define which tags they see in the UI and how to exclude tags if necessary. I assumed that was part of the File Viewer Configuration Record,. Is that not correct?

Commented [KH7R4]: @Kyle Hagan Test order of files with Filter Fields on Tagger. and test and document other fields types

Configuration for Community Page

This section will require an active community to setup

Open the Community Builder from Salesforce Setup, navigate to the Community page you want to add the component, open the Components menu on the right, then navigate to the Custom Components Section. From here you can drag either the File View or File Tag Launcher Component onto the community page.

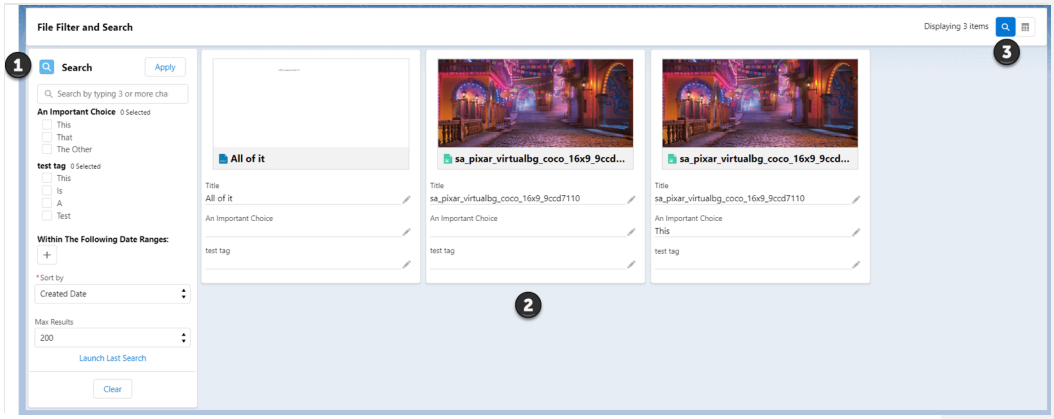


From here you can follow the record page Configuration section above to configure the components.

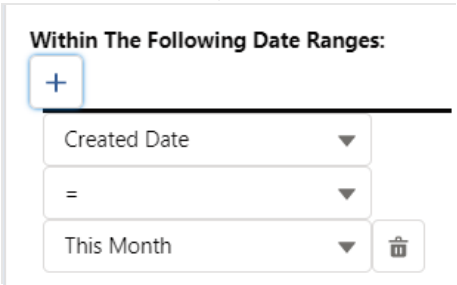
Component Overview

Commented [KH8]: This Section is still in progress

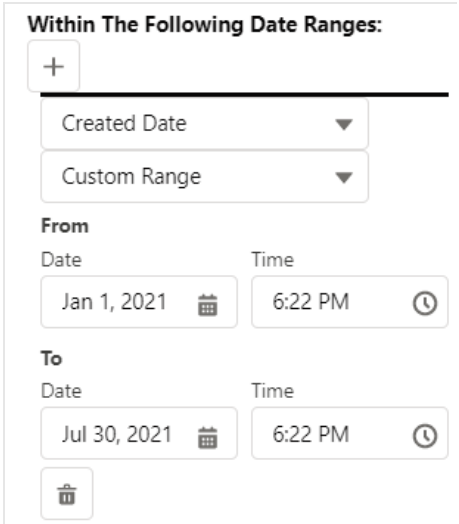
FileViewer



1. Search Section: The topmost bar will allow you to search any of the object allowed to be search from the setup of the component. If Search Objects was left blank it will search all objects. The Apply button will apply any search elements defined in the search section.
    a. Each tag is shown in the search section filter documents. Check the boxes for the tags you want to filter on the click Apply.
    b. Clicking the + button below the 'Within The Following Date Ranges:' section will result in a date filter section being added.



This allows you to use the date fields on the Content Version to filter. If you choose Custom range, you will be given a date picker UI to choose the dates:



This can be added multiple times. Once you add dates to filter on click the Apply button.

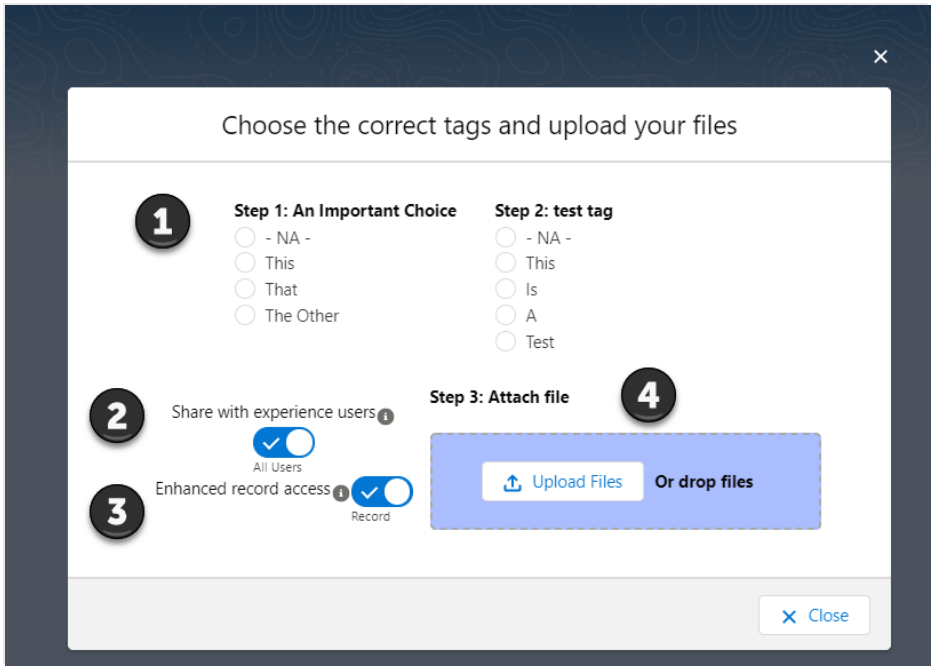
c. Sort By will allow you to sort the searched files by the chosen field

d. Max results limits the number of results per page by the chosen number

2. Results Section: This is the files returned by your search results. Each tile is set up the same way. Clicking one of the edit panels will allow the user to edit the file.
   a. Preview of the Document
   b. Title of the document
   c. All tags on the Content Document object
3. This section will allow you to toggle various aspects of the File Viewer page
   a. This displays the number of records returned form the search.
   b. Clicking this will toggle the search section from visible (blue) to not visible (white)
   c. Clicking this will toggle the results section from list view (blue) to tile view (white)

Commented [KH9]: @Jordan Pesusich How are these fields determined?

FileTaxonomyLauncher



When using this UI please make sure you follow the steps in order (1 -> 2 -> 3) to make sure tagging and sharing works correctly with each file.

1. This Section Shows you the Tags they can be associated with the files uploaded. Make sure to set your tags before you upload the file. Tags can be left the same between upload or changed. If you use the Upload Files button the set tags will be associated with all files uploaded.
2. This section allows for the user to decide if the uploaded files should be shared with all users (All Users) or only internal users (Default). This works on a per file bases if drag drop is used or with multiple files if using the Upload Files button.
3. This Section allows for the user to decide if they want to have the files shared with inferred sharing from the related records (Record) or only if the file should be view only to people with record access (viewer). This works on a per file bases if drag drop is used or with multiple files if using the Upload Files button.
4. This is the section where you literally upload the files. You can drag drop one file at a time or click the upload files button to upload multiple files.