

# 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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'app manager' and a list of links including 'App Manager'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 21 items. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Sales' app is highlighted, and an 'Edit' button is visible next to it.

| App Name                         | Developer Name               | Description  | Last Modified         | App Type  | Visibility |
|----------------------------------|------------------------------|--|-----------------------|-----------|------------|
| Customer Portal                  | customer portal              |  | 1/11/2021, 8:38 AM    | Community |            |
| Lightning Scheduler Setup        | LightningScheduler           | Set up personalized appointment scheduling.                                  | 3/22/2021, 12:15 P... | Lightning | ✓          |
| Lightning Usage App              | LightningInstrumentation     | View Adoption and Usage Metrics for Lightning Experience                     | 3/22/2021, 12:13 P... | Lightning | ✓          |
| Marketing                        | Marketing                    | Best-in-class on-demand marketing automation                                 | 3/22/2021, 12:13 P... | Classic   | ✓          |
| Platform                         | Platform                     | The fundamental Lightning Platform   | 3/22/2021, 12:13 P... | Classic   | ✓          |
| Queue Management                 | QueueManagement              | Create and manage queues for your business.                                  | 3/22/2021, 12:16 P... | Lightning | ✓          |
| Sales                            | Sales                        | The world's most popular sales force automation (SFA) solution               | 3/22/2021, 12:13 P... | Classic   | ✓          |
| Sales                            | LightningSales               | Manage your sales process with accounts, leads, opportunities, and more      | 3/22/2021, 12:13 P... | Lightning | ✓          |
| Sales Console                    | LightningSalesConsole        | (Lightning Experience) Lets sales reps work with multiple records on one ... | 3/22/2021, 12:13 P... | Lightning | ✓          |
| Salesforce Chatter               | Chatter                      | The Salesforce Chatter social network, including profiles and feeds          | 3/22/2021, 12:13 P... | Classic   | ✓          |
| Salesforce CMS                   | SalesforceCMS                | Manage content and media for all of your sites.                              | 3/22/2021, 12:13 P... | Lightning | ✓          |
| SalesforceDX Namespace Regist... | DEVHUB_9ecck5reyprov1j3q0... | The Developer Hub lets you view, create and manage scratch orgs and na...    | 3/22/2021, 12:27 P... | Connected |            |
| Service                          | Service                      | Manage customer service with accounts, contacts, cases, and more             | 3/22/2021, 12:13 P... | Classic   | ✓          |
| Service Console                  | LightningService             | (Lightning Experience) Lets support agents work with multiple records acr... | 3/22/2021, 12:13 P... | Lightning | ✓          |
| Site.com                         | Sites                        | Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ... | 3/22/2021, 12:13 P... | Classic   | ✓          |

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

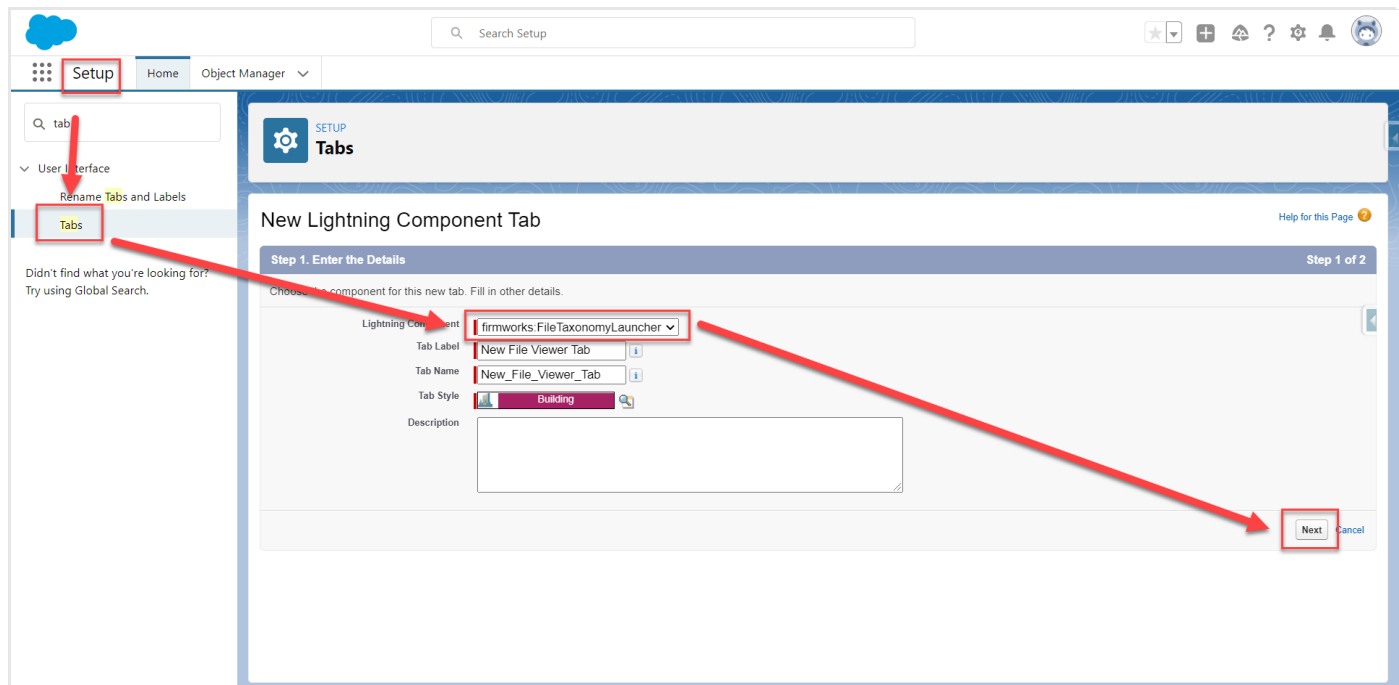
**Save**

## Creating a new File Viewer Tab

To Create a new File Viewer tab, go to Salesforce Setup -> Tabs -> Lightning 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.

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

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

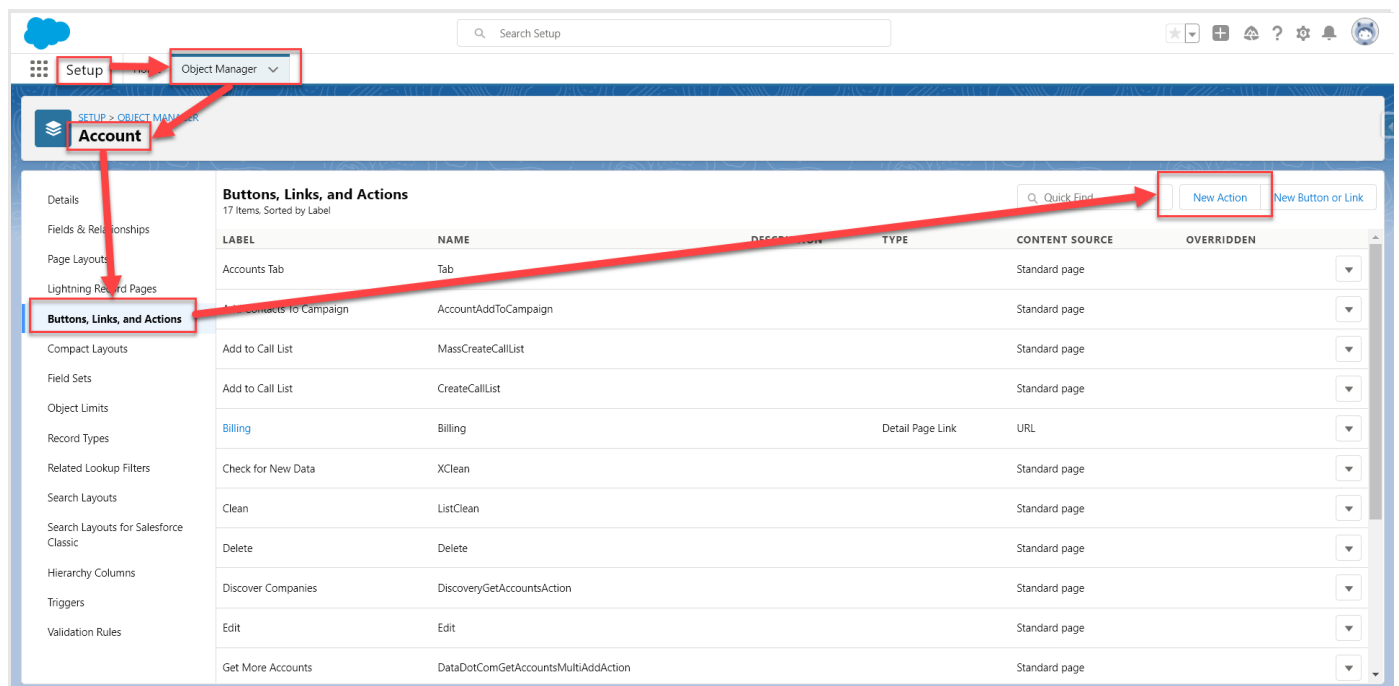


## Creating a File Viewer Lightning Tab

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

Account Actions

New Action

Enter Action Information

Save

Cancel

Object Name

Account

Action Type

Lightning Component

Lightning Component

firmworks:FileTaxonomy

Height

250px

Standard Label Type

--None--

Label


Tag and Upload

Name

Tag\_and\_Upload

Description

Icon

 [Change Icon](#)

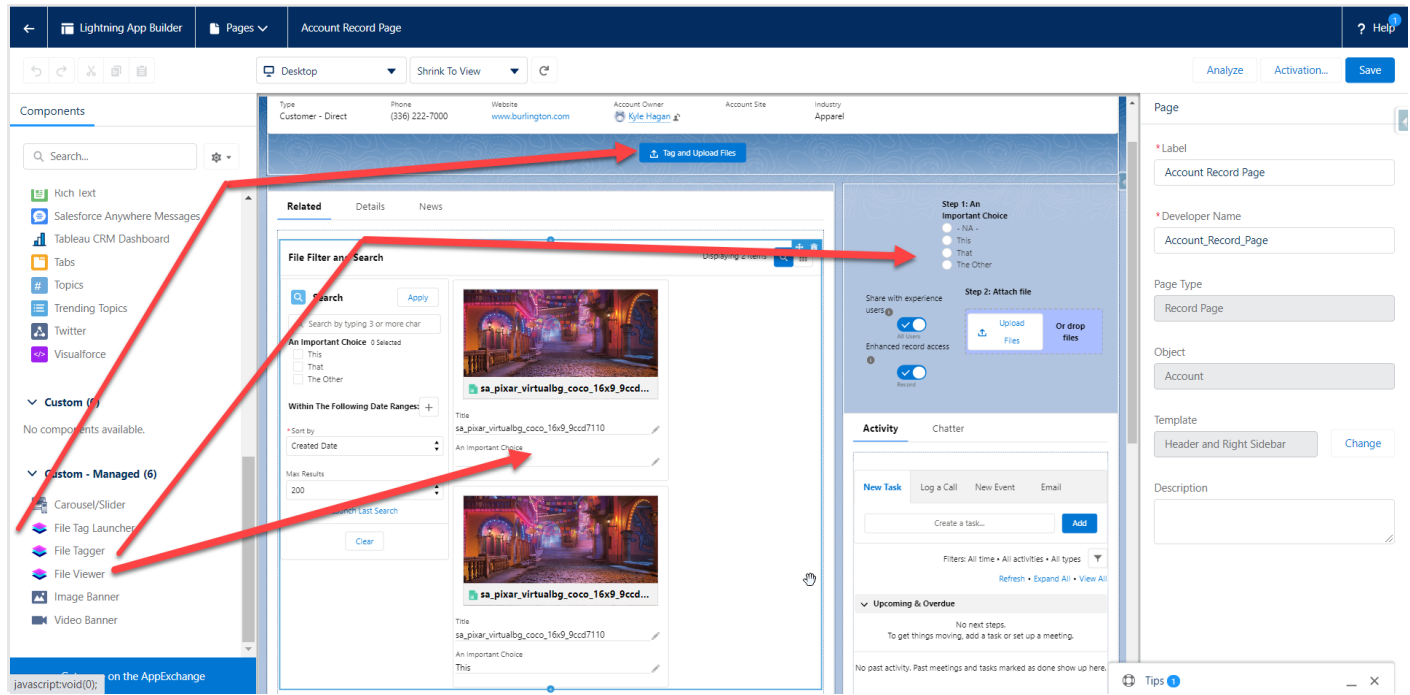
Save

Cancel

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

## Configuring 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 id to 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 out 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 without having to close and reopen the UI.
  - d. Filter Fields - A comma delimited 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

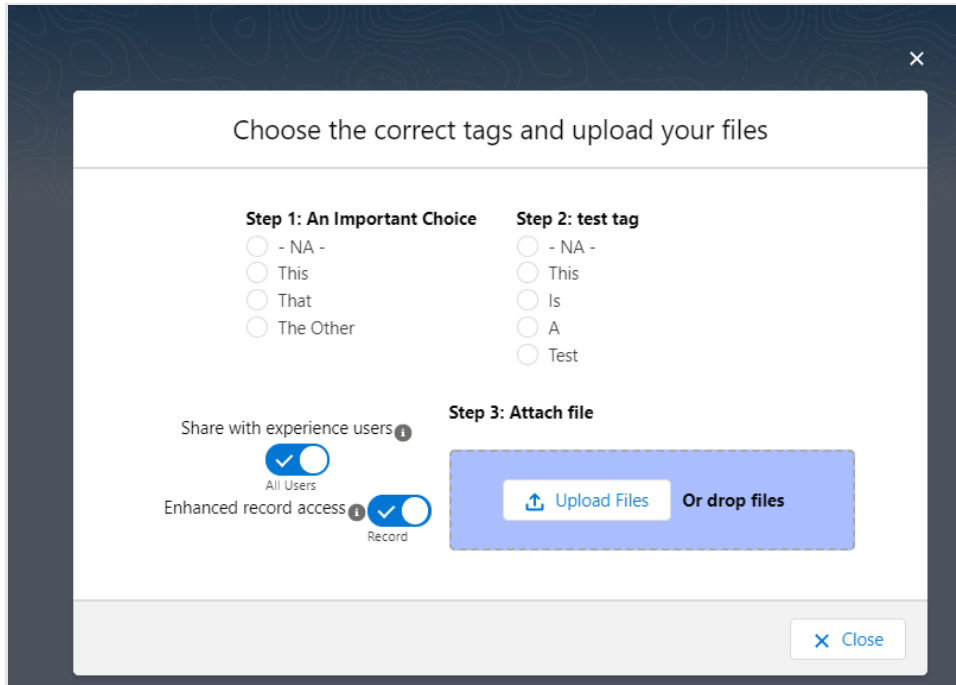


- d. Filter Objects - Comma delimited list of objects the user can filter against
  - e. Display Fields - Comma delimited list of content version fields to display
  - f. Filter Fields - Comma delimited list of content version fields to filter against
3. Behavior:
- a. Cache Id – If you want the behavior 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.

## 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.



The screenshot shows a dialog box titled "Choose the correct tags and upload your files" with a close button (X) in the top right corner. The dialog is divided into three sections:

- Step 1: An Important Choice**
  - ☐ - NA -
  - ☐ This
  - ☐ That
  - ☐ The Other
- Step 2: test tag**
  - ☐ - NA -
  - ☐ This
  - ☐ Is
  - ☐ A
  - ☐ Test
- Step 3: Attach file**
  - Share with experience users ☒ (with a help icon)
  - All Users
  - Enhanced record access ☒ (with a help icon)
  - Record
  - A dashed blue box containing:
    - (with an upload icon)
    - Or drop files

At the bottom right of the dialog is a button labeled "Close" with an X icon.

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 ...

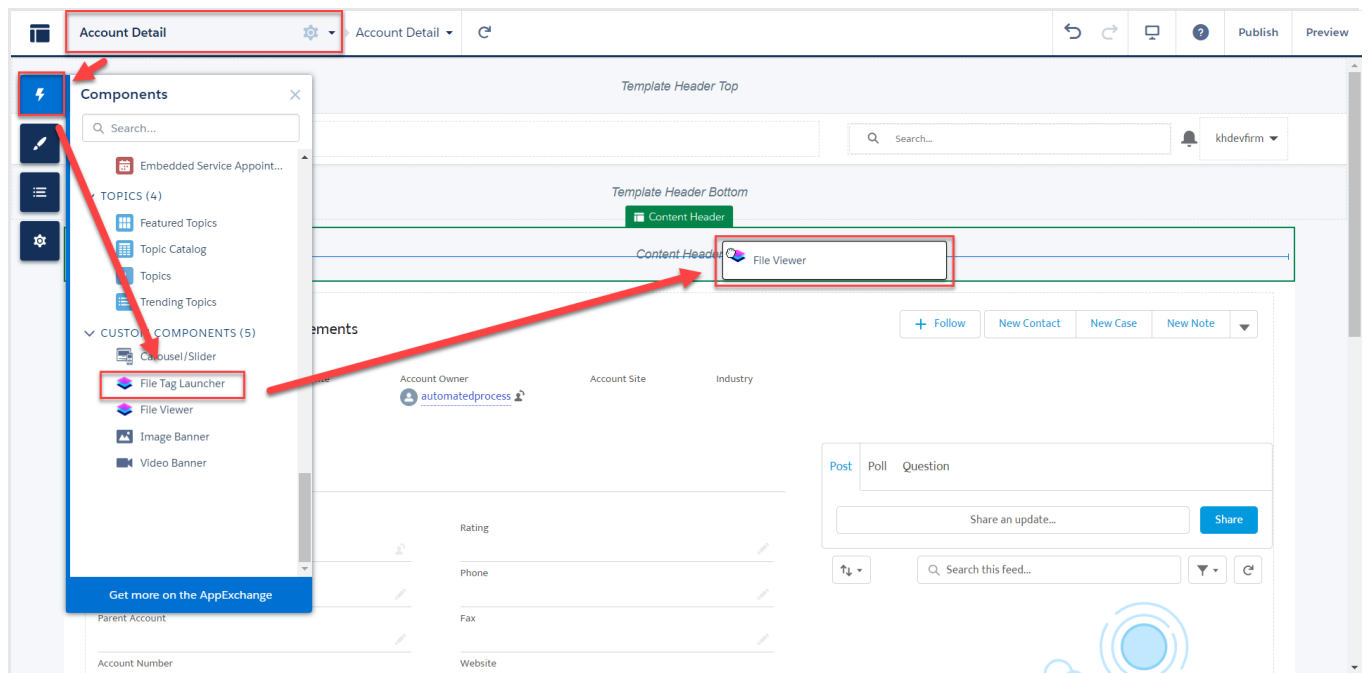
### Setting up a File Viewer Configuration Metadata Record

Coming Soon...

## Configuration for Community Page

This section will require an active community to setup

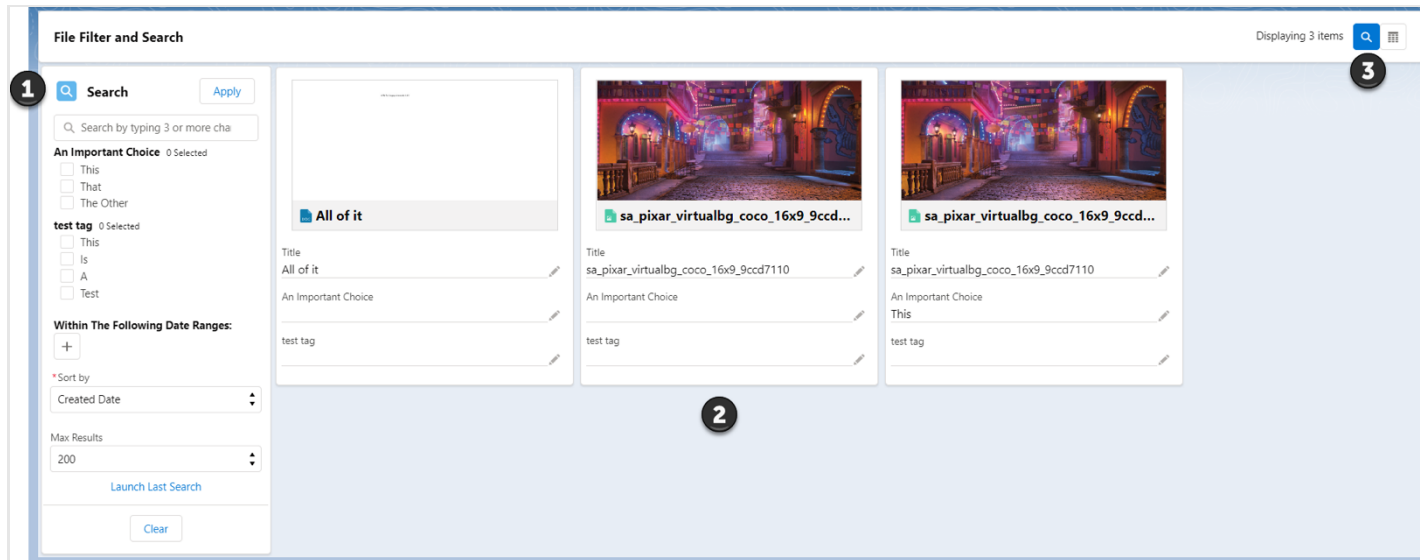
Open the Community Builder from Salesforce Setup, navigate to the Community page you want to add the component, open the Components menu on the right, then navigate to the Custom Components Section. From here you can drag either the File View or File Tag Launcher Component onto the community page.



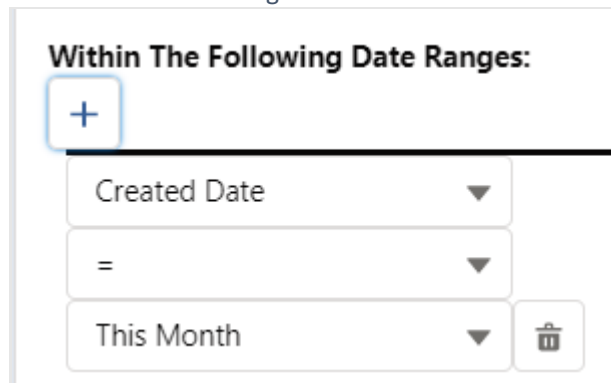
From here you can follow the record page Configuration section above to configure the components.

# Component Overview

## 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:

**Within The Following Date Ranges:**



---

Created Date ▼

Custom Range ▼



**From**

Date Time

Jan 1, 2021  6:22 PM 

**To**

Date Time

Jul 30, 2021  6:22 PM 

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 from 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)

## FileTaxonomyLauncher

The screenshot shows a window titled "Choose the correct tags and upload your files" with a close button (X) in the top right corner. The interface is divided into four numbered steps:

- Step 1: An Important Choice** (Step 1): A radio button selection for tags:   
☐ - NA -   
☐ This   
☐ That   
☐ The Other
- Step 2: test tag** (Step 2): A radio button selection for tags:   
☐ - NA -   
☐ This   
☐ Is   
☐ A   
☐ Test
- Step 3: Attach file** (Step 3): Two toggle switches.   
Step 2: "Share with experience users" (All Users) is currently turned on (blue).   
Step 3: "Enhanced record access" (Record) is currently turned on (blue).
- Step 4** (Step 4): A large blue box containing an "Upload Files" button with an upload icon and the text "Or drop files".

A "Close" button with an X icon is located at the bottom right of the window.

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.