



Google Drive Integration  
Summer 18

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# Google Drive Integration

Google Drive can now be integrated with Simpplr so that Google Drive files and folders are made easily accessible throughout the organization.

Site Owners/Managers can quickly connect files and folders to their Sites, where they can be organized to make them easily navigable. Permission levels can easily be set to control who can view or edit individual files and folders.

Files in Public Sites are accessible to all users, but can only be edited by Site members (depending on the Read/Write permission settings). Files in Private Sites are only accessible and editable (again, depending on the Read/Write permissions settings) by Site members.

App Managers can set it so that all Sites are linked to Google Drive by default (App Level) or so that Site Owners/Managers can choose whether to link individual Sites to Google Drive (Site Level). Whichever one of these settings has been chosen the Site Owner will need to connect to Google Drive before the Site can be connected.

Google Drive files are searchable in a variety of ways throughout Simpplr. The global search, accessed through the header search box, will search for all Google Drive files attached to Sites that you have access to (all Public Sites and any Private Sites that you are a member of). When adding Google Drive files to Content or Feed Posts you can search using the File Manager which allows a range of filters and search options.


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## Setup

### Remote Site Settings

Prior to connecting to Google Drive through Simpplr a System Admin must update the Remote Site Settings.

Go to **Salesforce > Setup > Installed Packages > Simpplr > Post Install Instruction**

Package Details Help for this Page 

## Simplr (Managed)

[Back to List: Installed Package](#)

**Installed Package Detail** [Uninstall](#) [View Components](#) [Manage Licenses](#) [Become Primary Contact](#) [View Dependencies](#)

Package Name	Simplr	Version Number	1.233.7
Language	English	First Installed Version Number	1.232.1
Version Name	Spring 2018, v1.233.7	Package Type	Managed
Namespace Prefix	Simplr	Allowed Licenses	5,000
Publisher	Simplr Inc.	Used Licenses	2,018
Status	Active	Modified By	Simplr, 4/13/2018 7:38 PM
Expiration Date	12/30/2018		
Description	Simplr release package.		
Post Install Instructions	<a href="#">View</a>		
Installed By	<a href="#">Ashish Narang</a> , 3/30/2018 2:42 AM		

Count Towards Limits

Apps	1	Tabs	2
		Objects	78

This will take you to the Post Install Setup Pages.

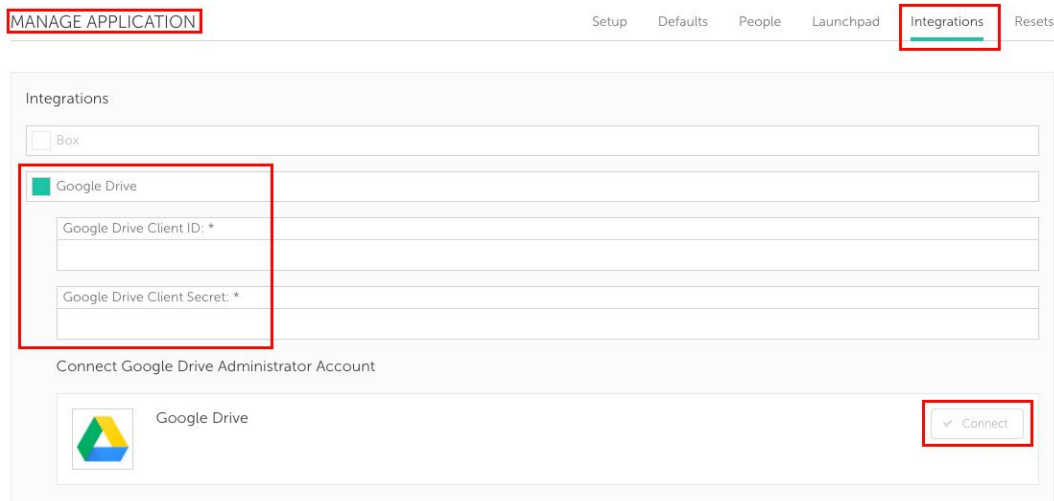
Google

- [Click here](#) to add following URL to Remote Site Settings, if it is not done already.  
 Remote Site Name - Google\_Account  
 Remote Site URL - https://accounts.google.com  
 Disable Protocol Security - Unchecked  
 Description - Used to initiate Google OAuth and Token workflow  
 Active - Checked
- [Click here](#) to add following URL to Remote Site Settings, if it is not done already.  
 Remote Site Name - Google\_API  
 Remote Site URL - https://www.googleapis.com  
 Disable Protocol Security - Unchecked  
 Description - Used to get Google Drive file information  
 Active - Checked

In the Google section select 'Click here' for point 1 and then 'Save' on the Remote Site Edit form. Then do the same for point 2.

# Connecting the App

To integrate Google Drive firstly the App Manager must connect their service account to Simpplr on an App Level. This can be done by going to **Manage Application > Integrations**.



The screenshot shows the 'MANAGE APPLICATION' interface. The top navigation bar includes 'Setup', 'Defaults', 'People', 'Launchpad', 'Integrations' (highlighted), and 'Resets'. The main content area is titled 'Integrations' and contains a list of integrations. 'Box' is unchecked, and 'Google Drive' is checked. Below the 'Google Drive' checkbox, there are two input fields: 'Google Drive Client ID: \*' and 'Google Drive Client Secret: \*'. Below these fields, there is a section titled 'Connect Google Drive Administrator Account' which includes the Google Drive logo and a 'Connect' button.

The App Manager must enter our Google Drive Client ID and Secret. Please contact our Support team by emailing [support@simplr.com](mailto:support@simplr.com) to request our Client ID and Secret, please provide your Home Dashboard URL in the email.

Once you have done the above, go to **Manage Application > Integrations**, click “Connect” next to “Google Drive”, and login to your Google Super Admin account.

Once the App Manager has connected to Google Drive an Application Root Folder and an All Company Group will be created.

## Application Root Folder

- When the App is connected to Google Drive an Application Root Folder will be created in the Google Drive service account.
- The folder will be named in the format “\*appname\* Root”.
- This folder will be accessible through the Google Drive service account
- We use this folder to define our search result parameters when searching for Google Drive folders/files that have been attached to Simpplr

## All Company Group

- When the App is connected to Google Drive an All Company Group will be created in the Google Drive service account.
- This is also used to define our search parameters when searching for Google Drive folders/files that have been attached to Simpplr
- As individual users connect to Google Drive they will be added to this All Company Group
- Once a user is added to the All Company Group they will be able to access all Google Drive folders/files that have been added/linked to Public Sites.
- To access the Google Drive folders/files that have been added/linked to Private Sites you must be a member of the Site as well as being in the All Company Group.

## Multiple File Storage Integrations?

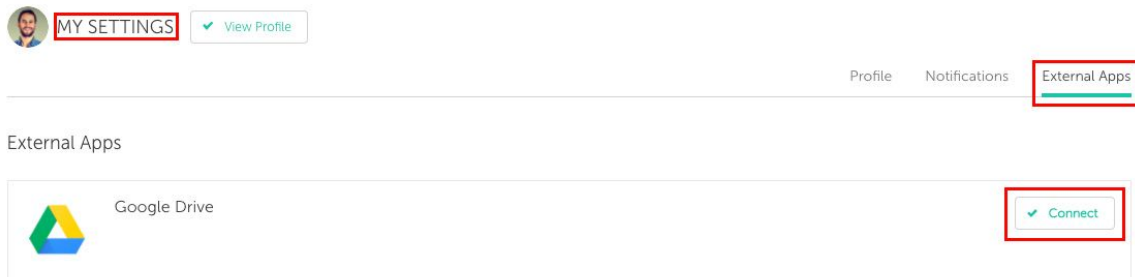
It is worth noting that at any given time, only one File Storage integration will be allowed within the application (App Level).

To switch between the File Storage Integrations, an App Manager has to first disconnect the existing integration on an app level and then connect with the other File Storage integration provider.

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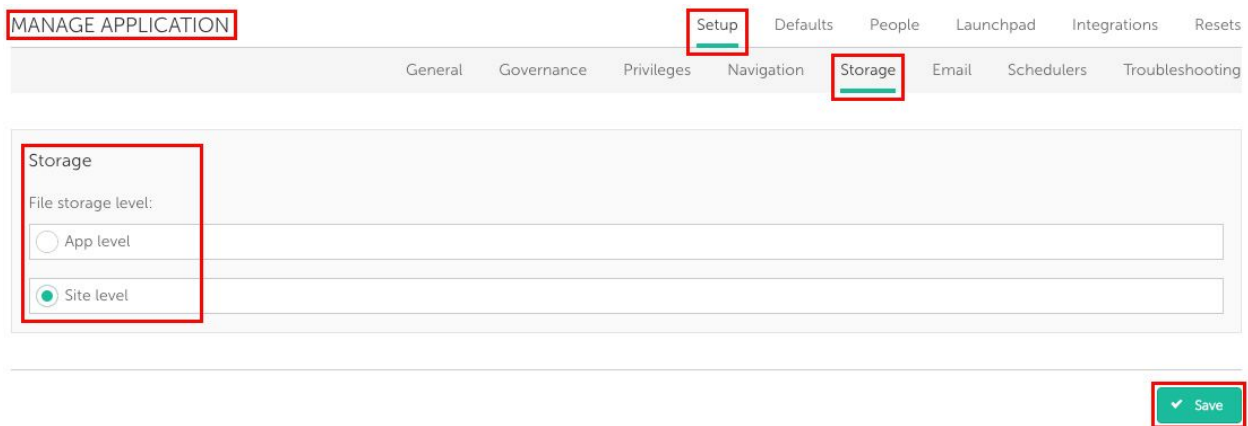
## User Setup

Each individual user needs to connect to their Google Drive account to start using the integration. This can be done by going to **My Settings > External Apps**.



Once a user connects their Google Drive account they will be added to the All Company Group, and therefore will be able to access all Google Drive folders/files that have been added/linked to Public Sites. Google Drive folders/files in Private Sites are only accessible to Site members.

## Site Storage



- Once the Site Owner connects to Google Drive, they will have the choice to connect each individual Site that they own to google Drive by going to Manage Site > Setup and selecting 'Google Drive'.

- A Root Folder will then be created in their Google Drive > My Drive for that Site. The Root Folder will have the same name as the Site.
- Google Drive folders/files can then be added to that Site.
- If the Site is Public every user who has connected to Google Drive will have access to the Google Drive folders/file that are added/linked to the Site.
- If the Site is Private only members of the Site who have connected to Google Drive will have access to the Google Drive folders/file that are added/linked to the Site.
- Once a Site has been connected to Google Drive and a Site Root Folder has been created, a Site Group will be created consisting of all of the members of that Site, this is because folder permissions can be different for Site members and non-members (please see the [Folders Permissions](#) section below for more details on this).

## Site Root Folder

### From Simpplr

- The Site Root Folder lives in the Site Owner's Google Drive > My Drive
- When viewed in the Site Owner's Google Drive > My Drive the folder will have the same name as the Site. When viewed in the Files section of the Site this folder will be named 'Google Drive Files'
- It cannot be deleted by anyone
- folders/files can be uploaded to the Site Root Folder
- You can only link Google Drive folders to the Site Root Folder
- You cannot move folders/files from any non Google Drive folder to the Site Root Folder
- You can add new folders to the Site Root Folder and subfolders
- You can move files from the Site Root Folder into subfolders
- You can move files between subfolders
- You cannot move files from other System folders into the Site Root Folder
- If you change the name of your Site in Simpplr the name of the Site Root Folder will change in the Site Owner's Google Drive > My Drive
- If the Site is deactivated in Simpplr, the Site Root Folder remains in the Site Owner's Google Drive > My Drive with no changes to it. If the Site is then re-activated, there are also no changes to the location or behaviour of the Site Root Folder.

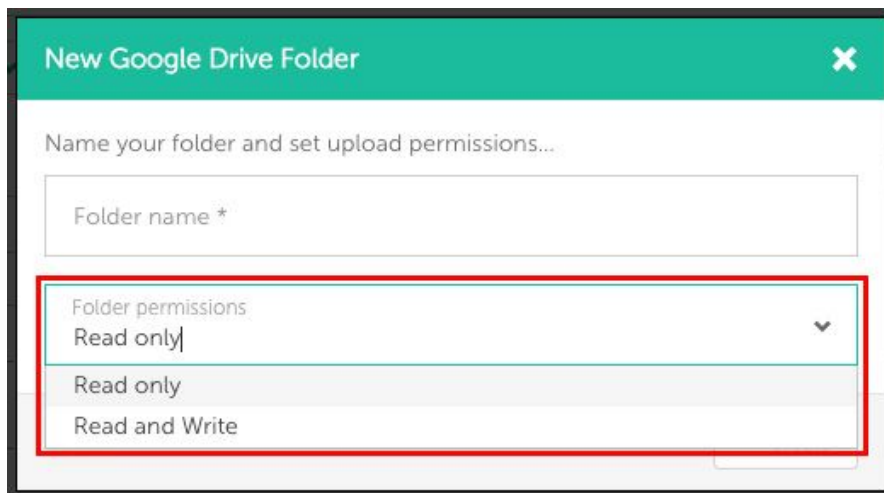


## From Google Drive

- The Site Root Folder can be changed in any way that Google Drive normally allows folders to be changed
- You can change the name of the Site Root Folder in Google Drive and it will not affect the behaviour of the folder within Simplr, however the name will appear changed within the Simplr Site which could lead to confusion for users.
- **Caution is advised when making any changes to the Site Root Folder from Google Drive**
- Any changes made to the Site Root Folder can have an affect on its behaviour in Simplr.

## Folder Permissions

When a Site Owner/Manager creates a new Google Drive folder they can set the permission to either Read/Write or Read.



The image shows a screenshot of a 'New Google Drive Folder' dialog box. The dialog has a green header with the title 'New Google Drive Folder' and a close button. Below the header, it says 'Name your folder and set upload permissions...'. There is a text input field for 'Folder name \*'. Below that is a dropdown menu for 'Folder permissions' with 'Read only' selected. The dropdown menu is open, showing 'Read only' and 'Read and Write' as options. A red box highlights the dropdown menu area.

- Public and Private Sites - members of the Site will inherit the folder permissions set by the Owner/Manager.
- Public Sites - For non-members all folders are Read only.
- Private Sites - Non-members cannot access Google Drive folders.

## Examples:-

### Public Site-

- User A is a member
- User B is not a member
- Owner adds Read/Write folder to Google Drive
- User A has Read/Write access
- User B has Read access

### Private Site-

- User A is a member
- User B is not a member
- Owner adds Read/Write folder to Google Drive
- User A has Read/Write access
- User B has no access to the Site.

When a folder is unlinked from a Site it is removed from the Site Root Folder, and the permissions are separated from the Site Group. The unlinked folder's permissions will revert to those of its parent folder.

## Linking folders to Root Folder

- All Site Owners and Managers can link folders to a Site, as long as they have connected to Google Drive and the Site is connected to Google Drive.
- Once a folder is linked to a Site, the folder and any files within it are accessible to anyone who has access to the Site and has connected to Google Drive.
- The linked folder is added to the Site Root Folder that is stored in the Site owner's Google Drive.
- To link a Google Drive folder to a Site select the 'Link Google Drive Folder' button.

The screenshot shows the Joomla! Files management interface for a site named 'SAN FRANCISCO'. The top navigation bar includes 'Dashboard', 'Feed', 'Pages', 'Events', 'Files' (highlighted with a red box), 'Albums', and 'About'. Below the navigation bar is a search box for 'Search Site Files...' and a dropdown menu for 'Created, newest'. A dashed box contains an '+ Add Files' button with the instruction '(Drag and drop here)'. Below this, the breadcrumb 'Site Files > Google Drive Files' is shown, followed by a '+ Link Google Drive Folder' button (highlighted with a red box) and a '+ New Google Drive Folder' button. A table lists the files and folders:

Name	Type	Owner	Edited	Options
San Francisco- Office documents	FOLDER	Troy Miller	Sep 29, 2017	

- You will then be able to select the Google Drive folder that you want to Link to and select the folder permissions.

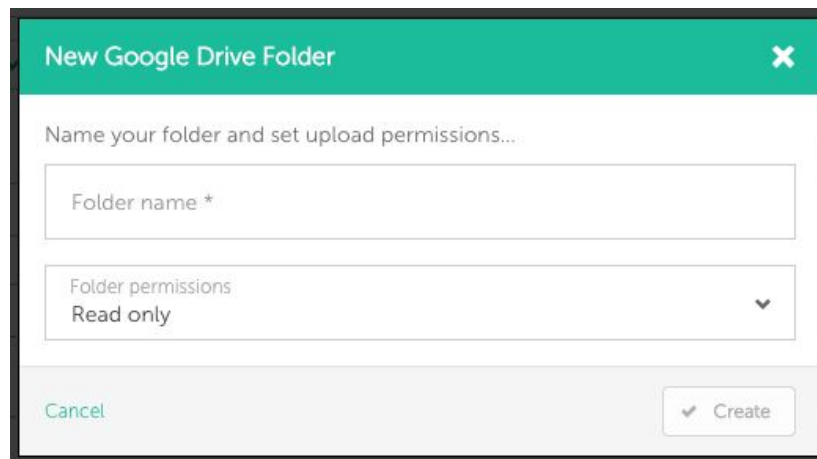
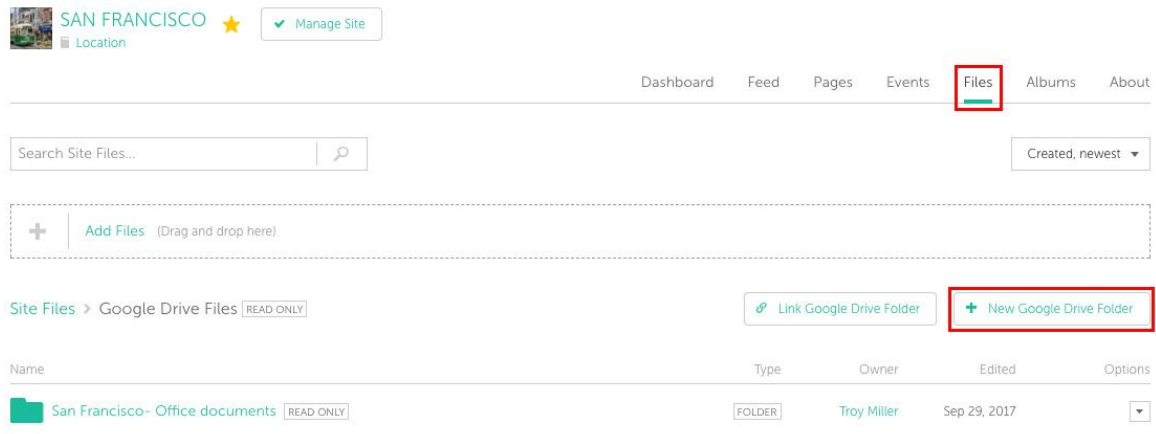
The screenshot shows a dialog box titled 'Link Google Drive Folder' with a close button (X) in the top right corner. The dialog contains the following elements:

- A header bar with the title 'Link Google Drive Folder' and a close button (X).
- A prompt: 'Select Google Drive folder and set upload permissions...'
- A dropdown menu with the text 'Please select...'
- A dropdown menu for 'Folder permissions:' with 'Read only' selected.
- A 'Cancel' button on the bottom left.
- A 'Link Folder' button with a checkmark on the bottom right.

## New folder

- Site Owners and Managers can add new folders to the Site Root Folder.
- When a new folder is added the Owner or Manager(s) can decide whether to set the permissions to Read or Read/Write.
- If the folder permission is set to Read, only the Owner or Manager(s) can add files to the folder.

- If the folder permission is set to Read/Write, any member of the Site will be able to add files to the folder.

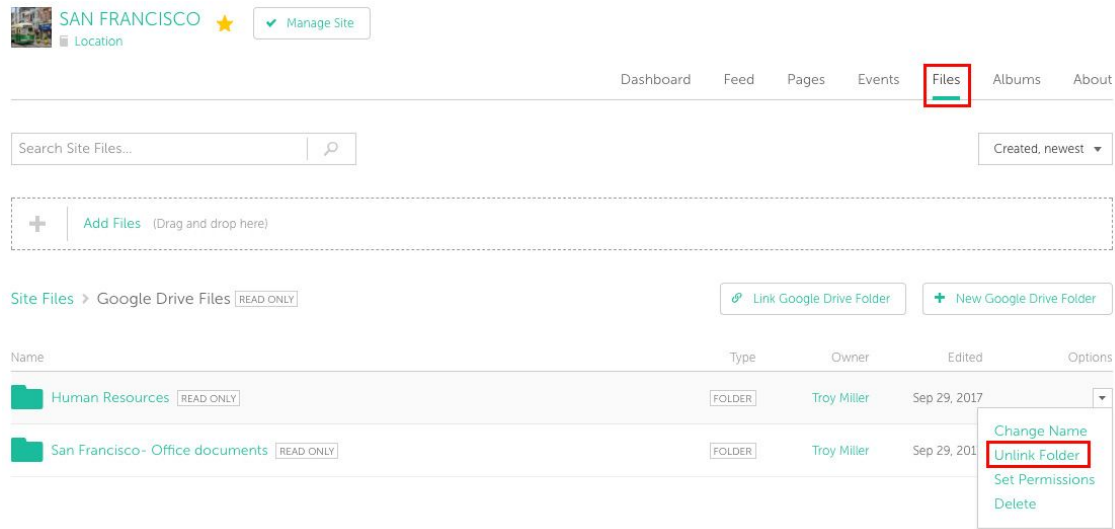


- The new folder will live in the Site Root Folder (or a subfolder of the Site Root Folder) in the Site Owner's Google Drive > My Drive.

## Unlinking folders from Root Folder

- When any folder is unlinked from the Site it is removed from the Site Root Folder.

- The unlinked folder will now appear at the Google Drive > My Drive root of the folder owner as well as in its original location.
- The unlinked folder's permissions are separated from those of the Site Group. The permissions will revert to those of its parent folder.



## Moving Files

- It is possible to move files between Google Drive folders.
- It is not possible to move files from non Google Drive folders to Google Drive folders and vice versa.


## Uploading Files

- Site Owners and Managers can upload files to Read and Read/Write folders of Sites they own/manage.

- Site members can upload files to Read/Write folders.
- Non Site members cannot upload files, all folders will appear as Read only to them.
- The newly uploaded file will live in the Site Root Folder (or a subfolder of the Site Root Folder) in the Site Owner's Google Drive > My Drive.

## New Versions of Files

- It is not possible to create new versions of Google Application Files (Google Docs, Google Sheets, Google Slides etc...)
- It is possible to create new versions of non Google Application Files (pdf, jpeg, png, tiff etc...). You can view a history of file versions from the file detail page.
- If a folder is set to Read/Write then all members (including Site Owners/Managers) of a Site can create new versions. If a folder is set to Read, only Site Owners/Managers can make new versions
- If a user makes a new version of a file they do not take on ownership of that file, and the file remains within the Site Root Folder.

 IN SAN FRANCISCO > FILES

pexels-photo-265667.jpeg

Like Favorite Share


Owner	Troy Miller
Type	JPEG
Size	112.49 KB <a href="#">Download</a>
Location	<a href="#">San Francisco- Office documents</a> <a href="#">View in Google Drive</a>
Edited	2017-09-29 06:23:27
Version	1 <a href="#">Version History</a> <a href="#">Add New Version</a> <a href="#">Delete File</a>
Description	<a href="#">Edit</a>

There's no description to show here



# Sharing Files

- Google files can be shared into the Feed from the file detail page. Google files from Public Sites can be shared with all users and on all Sites. Google files from Private Sites can only be shared into the feed of that Site.

 TROY MILLER [Edit Profile](#)

[About](#) [Favorites](#) [Calendar](#) [Must Reads](#) [Feed](#) [Blog](#) [Org Chart](#) [Sites](#) [People](#) [Files](#)


pexels-photo-265667.jpeg

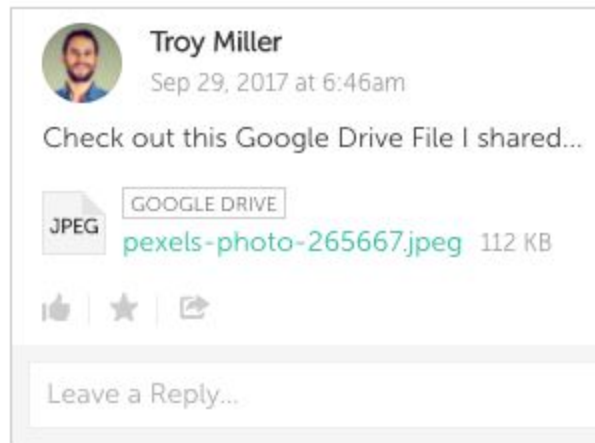
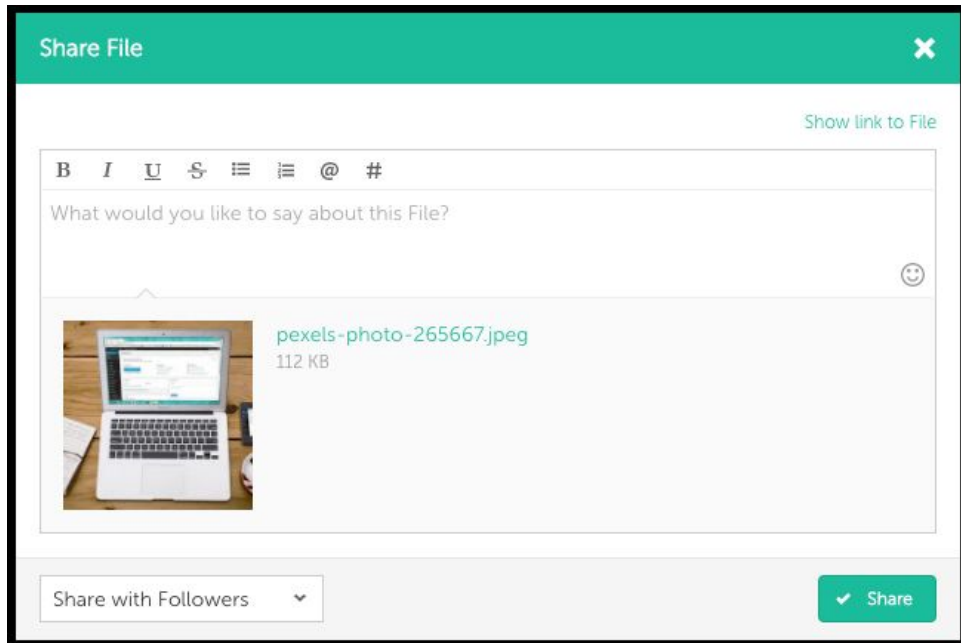
[Like](#) [Favorite](#) [Share](#)

Owner	<a href="#">Troy Miller</a>
Type	JPEG
Size	112.49 KB <a href="#">Download</a>
Location	<a href="#">San Francisco - Office documents</a> <a href="#">View in Google Drive</a>
Edited	2017-09-29 06:23:27
Version	1 <a href="#">Version History</a> <a href="#">Add New Version</a> <a href="#">Delete File</a>

Description [Edit](#)

There's no description to show here





## Adding Files to Content

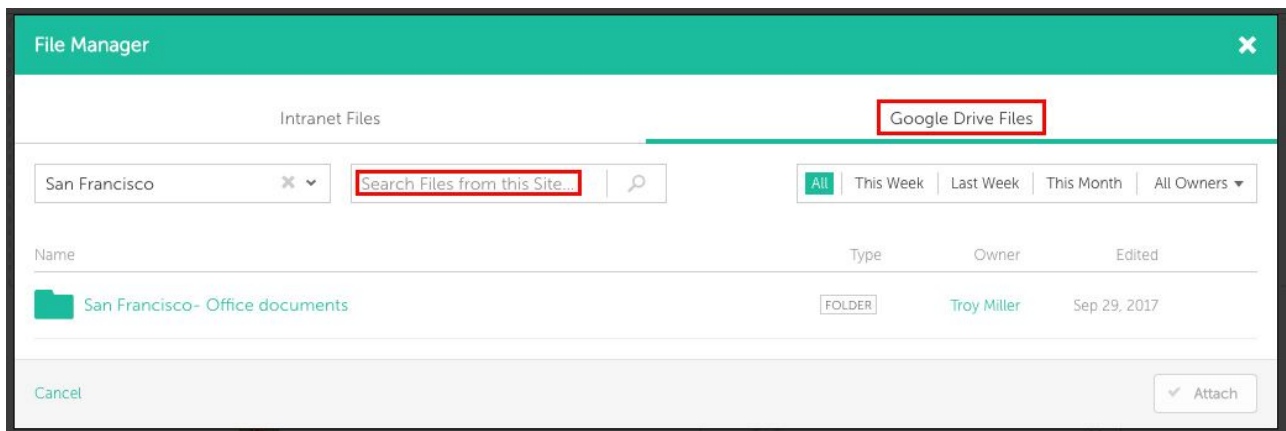
- Google files can be added to Content if the Site is connected to Google Drive and you have connected to Google Drive. Google files from Private Sites can only be added to Content within the Private Site.



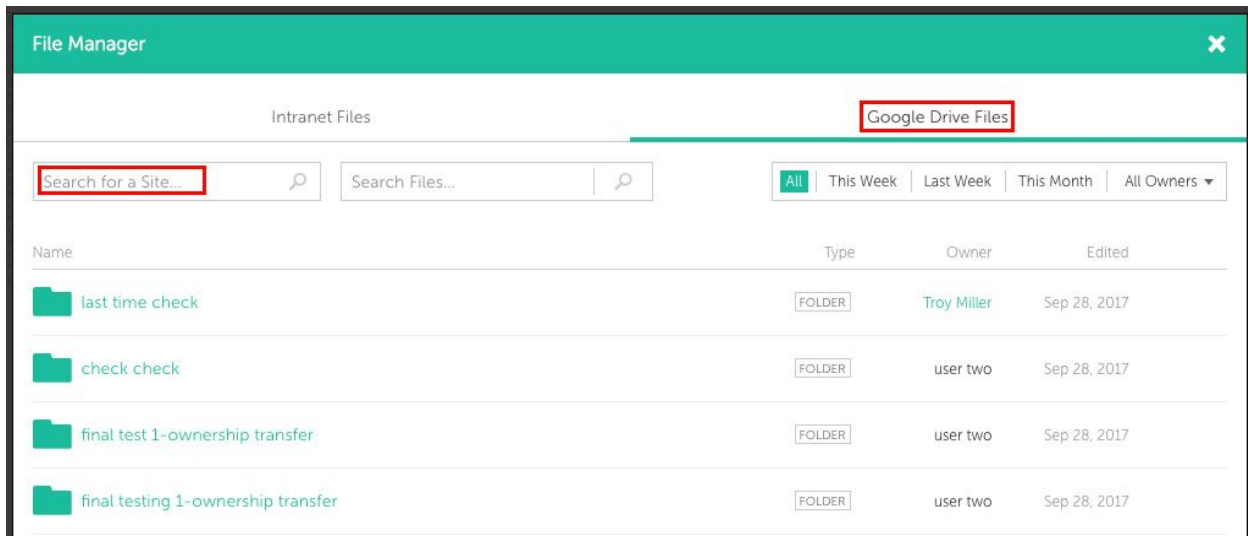
## Files



- Adding Google files to Content is done through the File manager.



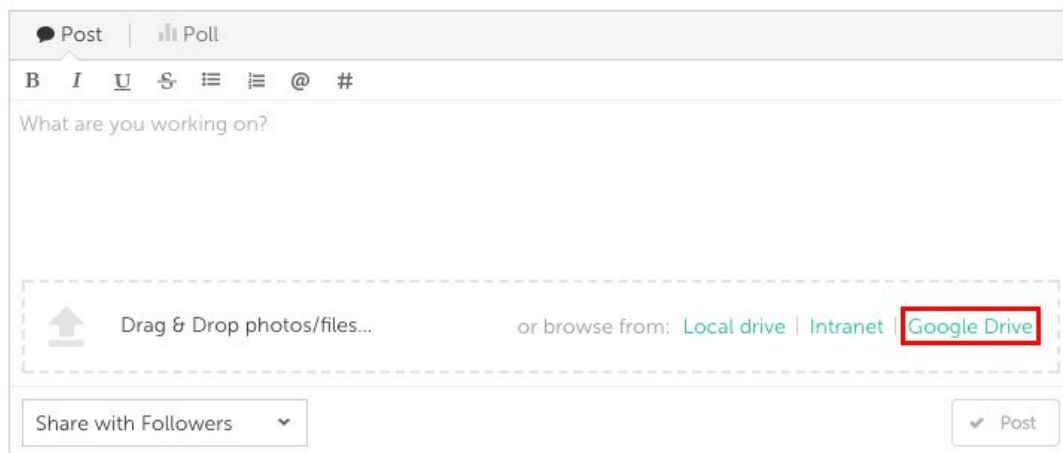
- When adding files to Content, by default the File Manager will search for files within the Site that you are adding Content to.
- If you remove the name of the Site from the search box, you will see all of the Google Drive files that you have access to. This will not include Google files within Private Sites that you are not a member of.



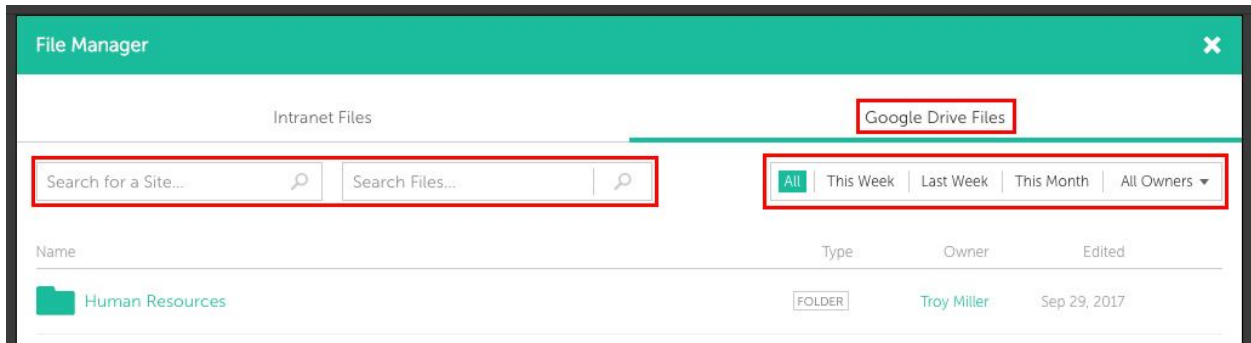
- You can also search for a specific Site to limit your search to.
- Results can be filtered by 'All', 'This Week', 'Last Week' and 'This Month', and by 'All Owners' or 'Owned by Me'.

## Adding Files to Feed Posts

- Any Google files that you have access to can be added to Feed Posts.
- This is also done through the File Manager.



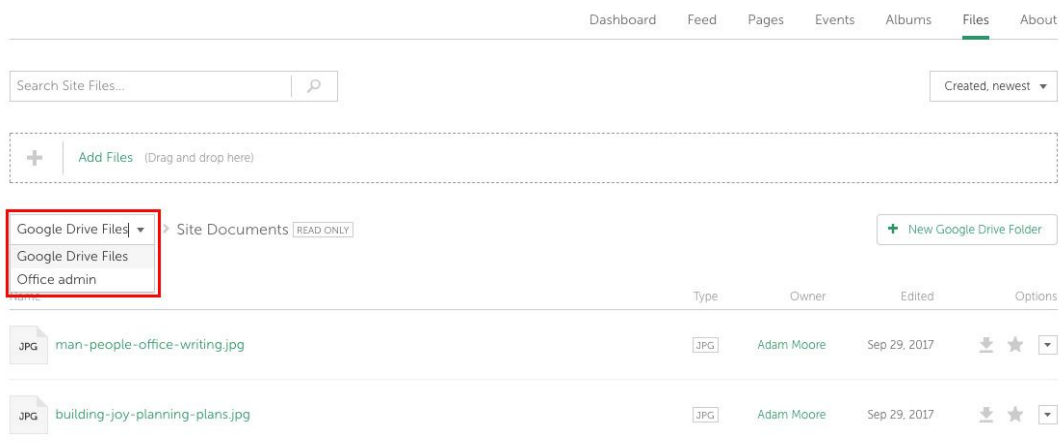
- When adding files on your Home Feed, by default the File Manager will search for all of the Google Drive files that you have access to.



- You can also search for a specific Site to limit your search to.
- Results can be filtered by 'All', 'This Week', 'Last Week' and 'This Month', and by 'All Owners' or 'Owned by Me'.

## Folders with multiple parents

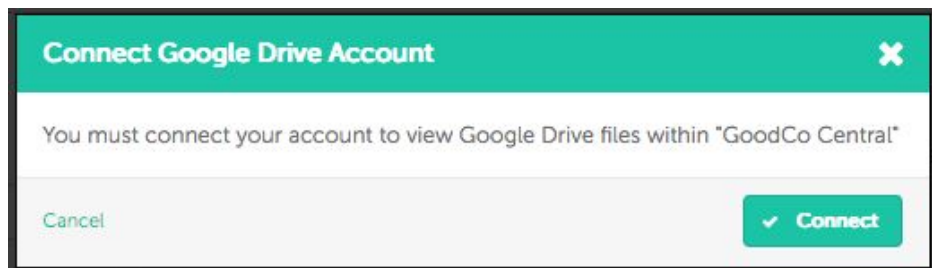
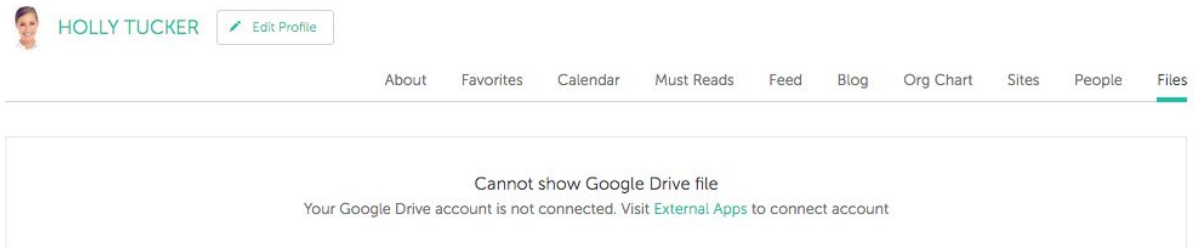
If a folder has multiple parents this will be displayed in a drop down when viewing the folder.



## Viewing Files

Once you have connected to Google Drive you are able to view your own Google folders/files and the Google folders/files of any Sites that you have access to.

- If you have not connected to Google Drive and try to view a Google folder/file you will receive a prompt advising you that you must connect to Google Drive before being able to view the folder/file.



If a file has multiple parents this will be shown on the file detail page.

building-joy-planning-plans.jpg

Like Favorite Share

Owner Adam Moore

Type JPG

Size 112.83 KB  
[Download](#)

Location [Office admin](#) [Site Documents](#)  
[View in Google Drive](#)

Edited 2017-09-29 14:16:37

Version 1  
[Version History](#)  
[Add New Version](#)  
[Delete File](#)

Description [Edit](#)

There's no description to show here



## Site Transfer

- If Ownership of the Site is transferred to a new User then the Site Root Folder will automatically be transferred to the new owner, as long as the new owner is connected to Google Drive.
- The Site Root Folder's location will then be changed to their My Drive and they will take over ownership of the folder. All of the files and folders within the Site Root Folder will also be moved to the new location.
- If the new Site Owner has not connected to Google Drive a warning message will be displayed to advise them that the Site Root Folder will be lost, they then have the option to cancel the transfer, connect to Google Drive and then start the transfer process again.

## Manager to Member transfer

- If a Site Manager becomes a Site member:-

- All of their Folders will be transferred to the Site Owner


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# Searching

## Global Search

The global search, made from the header search box, will search for all Google folders/files that in Sites that you have access to.

The screenshot shows the Simplr search interface. At the top left is the 'simplr.' logo. To its right is a search box containing the text 'calculator'. Further right are navigation icons: a plus sign, a calendar, a star, a grid, a notification bell with a red '2', and a user profile picture. Below the search box, the text 'SEARCHED FOR: CALCULATOR' is displayed. Underneath are filter tabs: 'Most Relevant' (2), 'Intranet Files' (9), 'Google Drive Files' (1), 'Albums' (1), and 'Feed'. The 'Google Drive Files' tab is highlighted with a red box. Below the filters is a table with the following columns: Name, Type, Owner, Edited, Location, and Options. The table contains one row with the following data: Name: office-pen-calculator-computation-163032.jpeg, Type: JPEG, Owner: Troy Miller, Edited: Sep 29, 2017, Location: Google Drive Files, Options: a star icon and a dropdown arrow.

Name	Type	Owner	Edited	Location	Options
 office-pen-calculator-computation-163032.jpeg	JPEG	Troy Miller	Sep 29, 2017	Google Drive Files	★ ▾