

Astrea Lightning Documents

User Guide

Astrea IT Services

C 52, Sector 65, Noida, U.P 201301

ngabrani@astreait.com

Astrea Lightning Document User Manual

Component Summary:

[Astrea Lightning Document](#) is a lightning component used to view the records of “Document” Object in lightning. It supports point and click Graphical Interface which is very simple and easy to use. Users can view the files of Document like PNG, PDF, JPEG, docs etc. in the Lightning view of Salesforce.

i) Features:

- ❖ We have provided a tab “Document” in the lightning as Salesforce classic. User can view/Delete all the documents in the list view.
- ❖ User can view the files like PDF, JPEG, PNG, docs, xml, csv, zip files etc in the lightning.

ii) Supported Formats:

- png
- xml
- jpeg
- gif
- csv
- css
- html
- Plain text
- Snote text
- Stypi text
- pdf
- zip
- mp4
- mpeg

ii) End User Settings:

First user needs to install the component from the Salesforce AppExchange.

The screenshot shows the installation configuration screen for an app from Astrea It Services Pvt Ltd. At the top, the publisher name is displayed. Below it, three installation options are presented: 'Install for Admins Only' (selected with a blue radio button), 'Install for All Users' (unselected), and 'Install for Specific Profiles...' (unselected). Each option is accompanied by an icon of user avatars. A blue arrow points to the 'Install' button, which is highlighted with a blue border. A 'Cancel' button is also visible. At the bottom, a table displays the app's details:

App Name	Publisher	Version Name	Version Number
[Redacted]	Astrea It Services Pvt Ltd	[Redacted]	[Redacted]

Installation is done when user will reached to that step.

The screenshot shows the 'Install' completion screen. The title 'Install' is followed by the publisher name 'By Astrea It Services Pvt Ltd'. A message box with an information icon and the text 'Installation Complete!' is displayed. A 'Done' button is located at the bottom right, highlighted with a blue border.

User can confirm installation of Component in org by search in Quick Find/ Search for Installed Packages. Snapshot is attached for reference.

Installed Packages

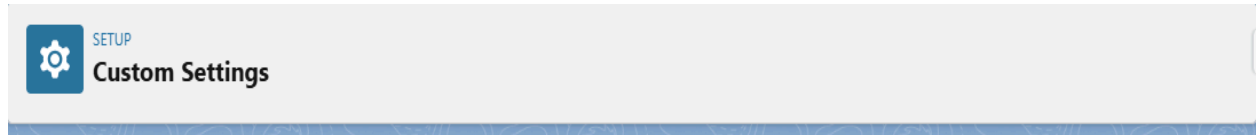
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tab	Objects
Uninstall	Unmanaged	Astrea IT Services	1.0		N/A	N/A	N/A	N/A	7/25/2017 12:03 PM	✓	1	5	2
Uninstall		Astrea IT Services	1.1	AstreaSNOW	Free	N/A	N/A	N/A	9/6/2017 9:27 AM	✓	1	1	1
Uninstall		Salesforce	1.27		Free	N/A	N/A	N/A	7/20/2017 10:38 AM		0	0	0

Here it will show you the name of the Component.

2. Document in Lightning Component Functionality

1. Configure Custom Setting :-

- Go to Setup Page
- Search and Click on **Custom Settings**



Custom Settings

[Help for this Page](#)

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All [Create New View](#)

[Get Usage](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit Manage	Lightning Document	Public	Hierarchy	lightningdoc		110	1	110

- Click on **Lightning Document**
- Click on **Manage**.

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit Manage	Lightning Document	Public	Hierarchy	lightningdoc		110	1	110

- Click on New Button in **Default Organization Level Value Section**.
- If you want to show the Delete button Check the **Visible Delete Button** otherwise leave as unchecked.
- Click on Save Button to save the Custom Setting.

Custom Setting Help for this Page ?

Lightning Document

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[Edit](#) [Delete](#)

▼ **Default Organization Level Value**

Location Astrea IT Services Visible Delete Button ☒

View: All ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

[New](#)

Setup Owner ↑	Location
No records to display.	

2. Go to App Launcher in the lightning experience.
3. Search for the Document Tab and click on it.
4. You will see the page as below :

★ With Check the **Visible Delete Button** :-

Cloud icon | All ▼ | Search Salesforce | [Icons: Star, Plus, Question, Gear, Bell, Profile]

Sales | Home | Opportunities ▼ | Leads ▼ | Tasks ▼ | Files ▼ | Accounts ▼ | Contacts ▼ | *** Document ▼** | X | More ▼ | [Pencil icon]

Documents					
5 items • Sorted by LastModifiedBy.Name					
	NAME	TYPE	DESCRIPTION	CREATED BY	LASTMODIFIED BY
1	HTML	html	This is HTML Files	Arti Goyal	Arti Goyal
2	Document	jpg	This is image	Arti Goyal	Arti Goyal
3	PDF Doc	pdf	This is PDF Document	Arti Goyal	Arti Goyal
4	Docs	txt	This is Text file	Arti Goyal	Arti Goyal
5	ZIP	zip	This is ZIP file	Arti Goyal	Arti Goyal

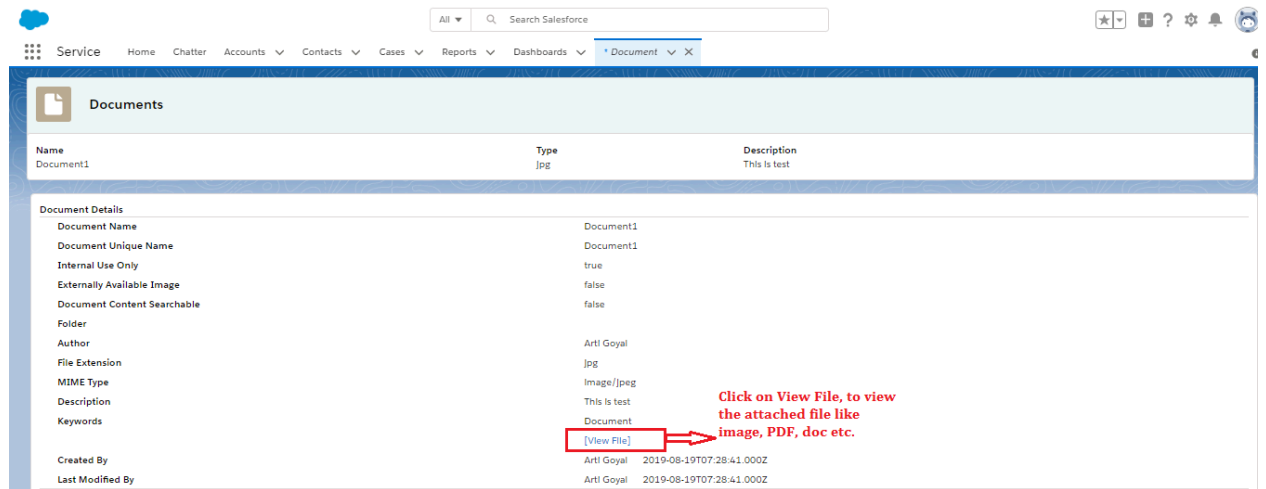
★ Without Check the **Visible Delete Button** :-

Documents						
20 items • Sorted by Last Modified						
Folders My Personal Document ▼						
	NAME	TYPE	DESCRIPTION	FOLDER NAME	CREATED BY	LASTMODIFIED BY
1	Document	jpg	This is image	My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
2	HTML	html	This is HTML Files	My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
3	PDF Doc	pdf	This is PDF Document	My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
4	ZIP	zip	This is ZIP file	My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
5	image	jpg	This is not important	My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
6	Document1	jpg		My Personal Document	Shobhit Aggarwal	Shobhit Aggarwal
7	Donate Image	jpg		My Personal Document	Shobhit Aggarwal	Shobhit Aggarwal
8	download.jpg	jpg		My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
9	download.jpg	jpg		My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2
10	Tets			My Personal Document	Shobhit Aggarwal2	Shobhit Aggarwal2

5. Click on the Document name to view the details of a particular document.

Cloud All Search Salesforce		
Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Document More		
Documents Delete		
Name	Type	Description
Document2 PDF	pdf	This is pdf document
Document Details		
Document Name	Document2 PDF	
Document Unique Name	Document2_PDF	
Internal Use Only	true	
Externally Available Image	false	
Document Content Searchable	true	
Folder	Folder1	
Author	Arti Goyal	
File Extension	pdf	
MIME Type	application/pdf	
Description	This is pdf document	
Keywords	Pdfdoc	
	[View File]	
Created By	Arti Goyal	2019-07-17T10:18:45.000Z
Last Modified By	Arti Goyal	2019-08-21T07:08:18.000Z

6. Now click on View file to see the attached file.



The screenshot shows the Salesforce 'Documents' page. At the top, there's a navigation bar with 'Service' and various tabs like Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, and a 'Document' tab. Below this is a 'Documents' section with a table. The table has three columns: Name, Type, and Description. The first row shows 'Document1', 'jpg', and 'This is test'. Below the table is a 'Document Details' section with a list of fields and their values. The 'Keywords' field has a '[View File]' link highlighted with a red box and an arrow pointing to it. A red text annotation says 'Click on View File, to view the attached file like image, PDF, doc etc.'.

Name	Type	Description
Document1	jpg	This is test

Document Details	
Document Name	Document1
Document Unique Name	Document1
Internal Use Only	true
Externally Available Image	false
Document Content Searchable	false
Folder	
Author	Arti Goyal
File Extension	jpg
MIME Type	Image/jpeg
Description	This is test
Keywords	Document [View File]
Created By	Arti Goyal 2019-08-19T07:28:41.000Z
Last Modified By	Arti Goyal 2019-08-19T07:28:41.000Z

7. User can delete the Document record either from the list directly or from the detailed page also.