Ver 1.0 October 5, 2015

Cloud Shared Office

Web Report for salesforce

Simple Setup Guide

Cloud Shared Office

1　In the Beginning

In CSO WebReport for Salesforce, anyone can easily create various Salesforce reports with your familiar Excel.

Configure data-mapping, multi-overlay that uses multiple sheets, and automatic output all without programming.

This guide will take you through the setting up of registering created overlay to the output of reports.
A guide for designing reports are to be released separately.
This guide does not include the setup of Salesforce.

2　Initial Settings

When importing CSO WebReport for Salesforce, it is necessary to configure the following settings first.

☐ User page layout settings
- ✓ Allow CSO Settings to be displayed on the Manage Users page in Salesforce.

☐ Prepare for report output
- ✓ Configure output objects.
- ✓ Place the Create Report button.

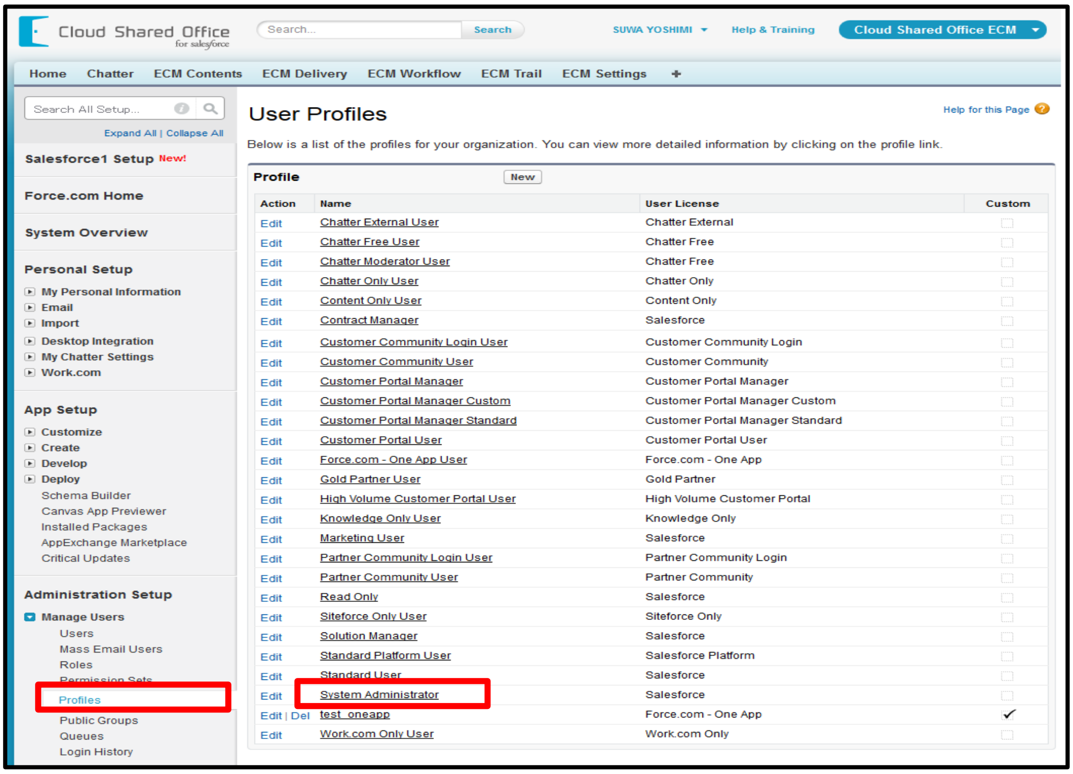
☐ Report information settings
- ✓ Register your created overlay to CSO WebReport for Salesforce.
- ✓ Data-mapping to configure the output order of sheets and to automatically insert the information registered in Salesforce.

☐ Enable Salesforce users
- ✓ From the Manage Users page in Salesforce, enable CSO WebReport for Salesforce.
- ✓ Batch enable CSO WebReport for Salesforce for multiple users.

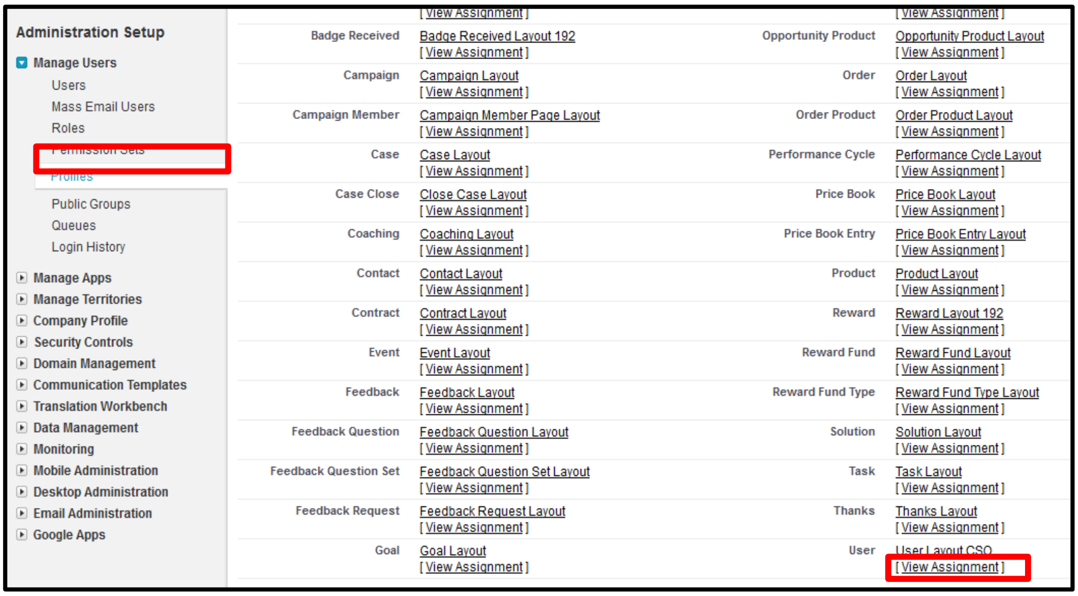
2.1　User page layout settings

To allow CSO Settings to be displayed on the Manage Users page in Salesforce, go to Settings (in Salesforce) >> Manage Users >> Profiles.

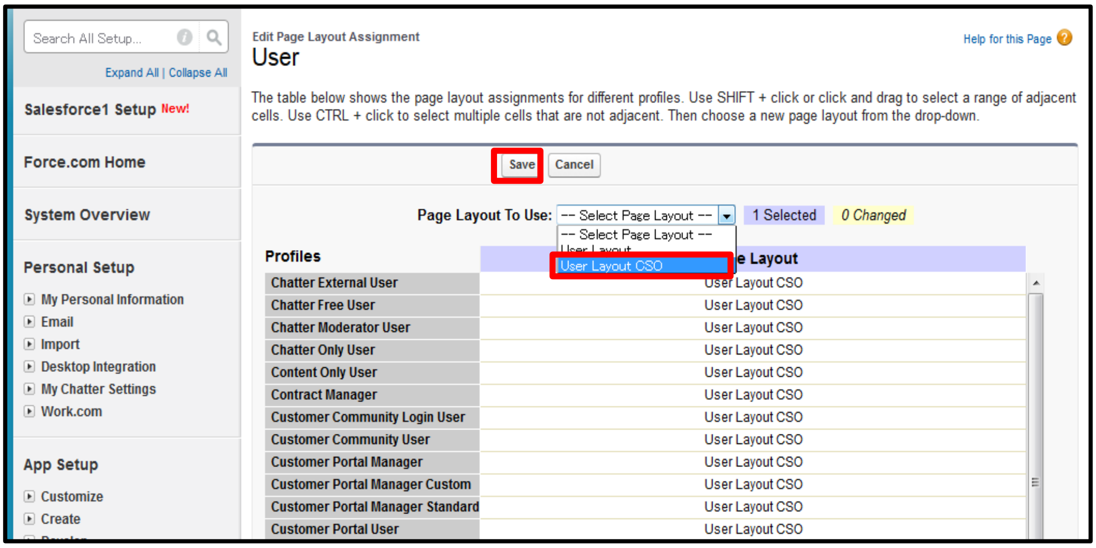
Then select System Administrator.



From the System Administrator's profile page, click User's "View Assignment".

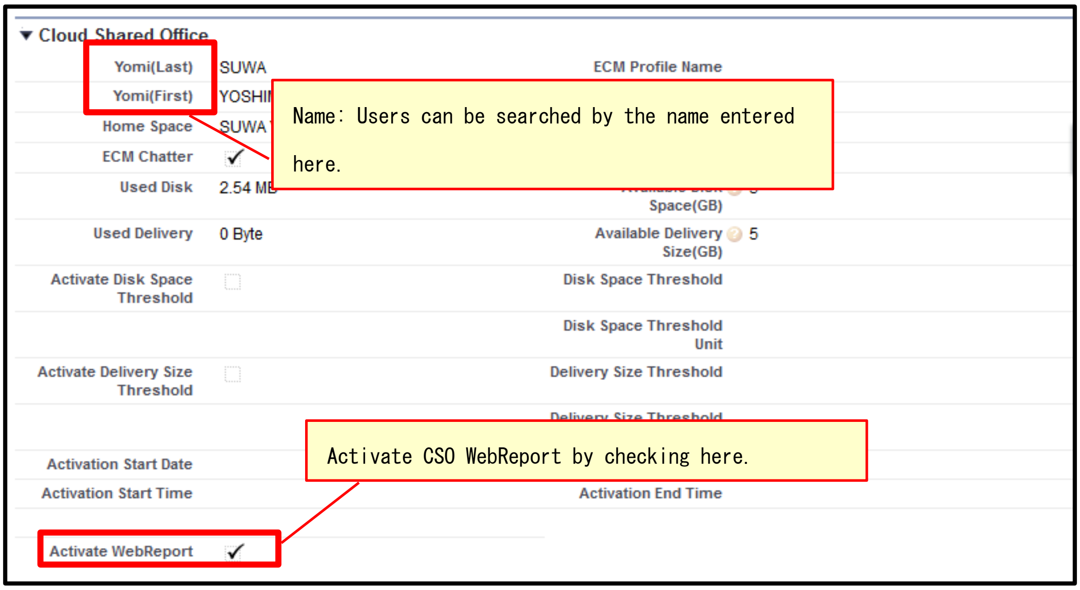


Click the "Edit Assignment" button, select "User Layout CSO" from the drop-down list beside "Page Layout to Use", then click the "Save" button.



On your own User Detail page in Salesforce, a section of “Cloud Shared Office” should have now been added to your user detail. Click the “Edit” button to edit necessary items.

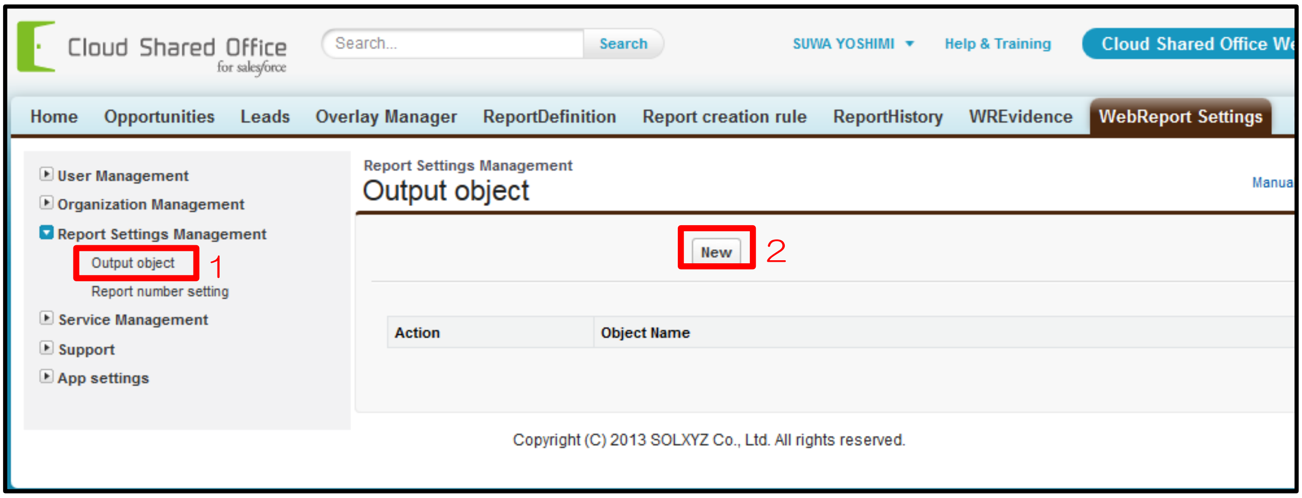
To enable WebReport, please be sure to check the box beside “Activate WebReport”. (This is further explained in chapter 2.7.)



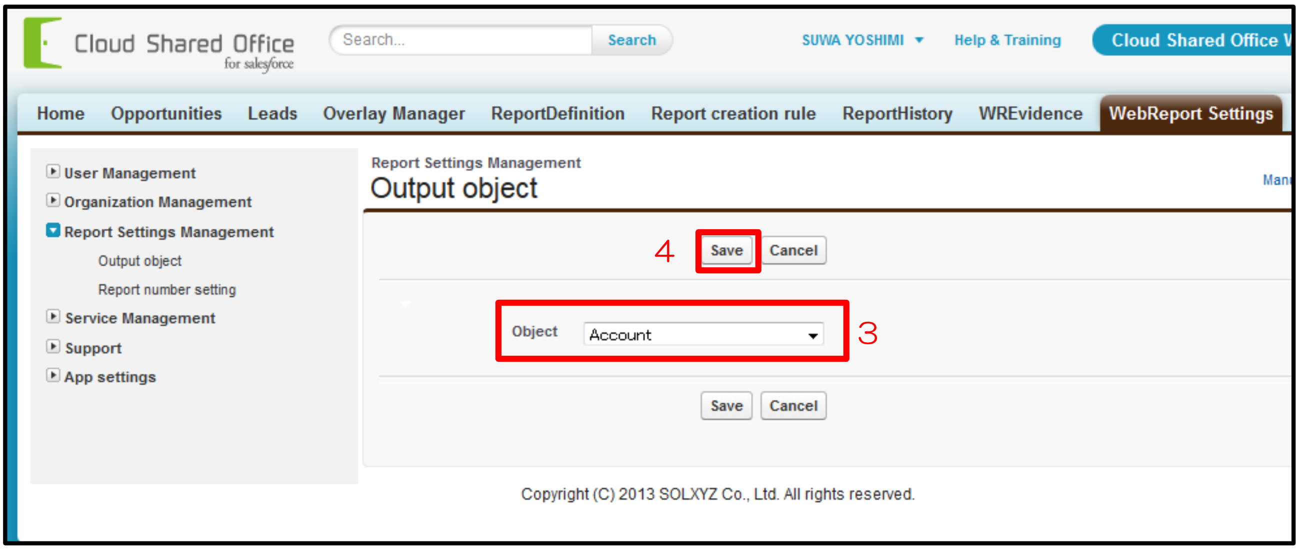
2.2 Output Object Settings

Configure output objects.

Go to WebReport setting >> Report Settings Management >> Output Object, click the “New” button.



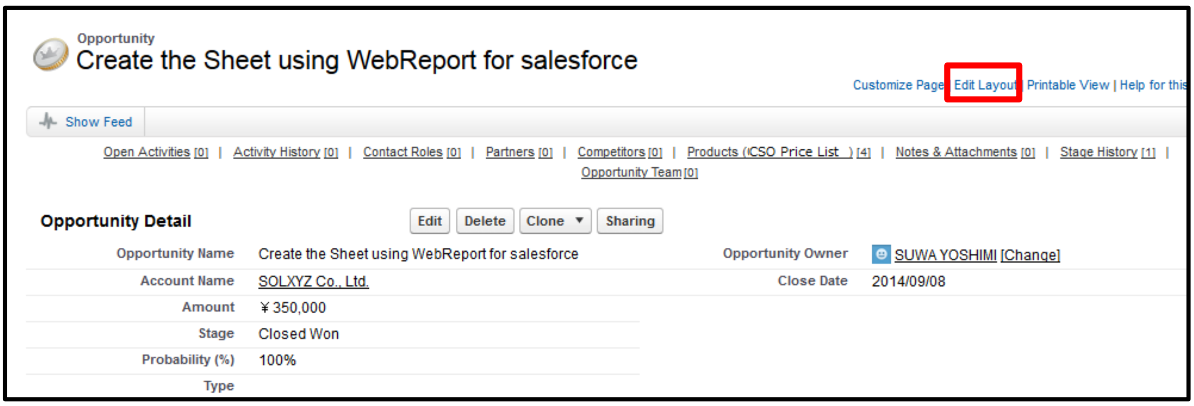
Select the object you wish to output and click the “Save” button.



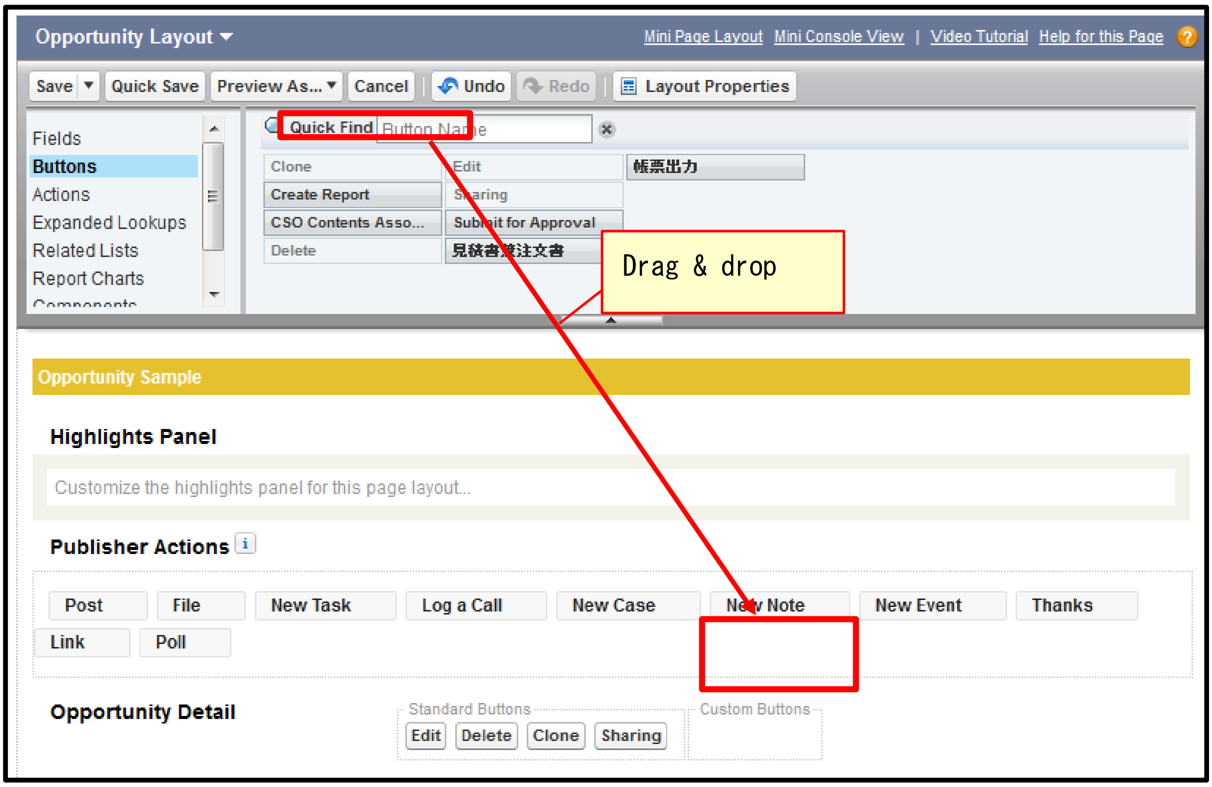
2.3　Place the Create Report Button

Place the “Create Report” button in the created Output Objects.

Open the target object, click on “Edit Layout”.



Drag and drop the “Create Report” button to the “Custom Buttons” area.

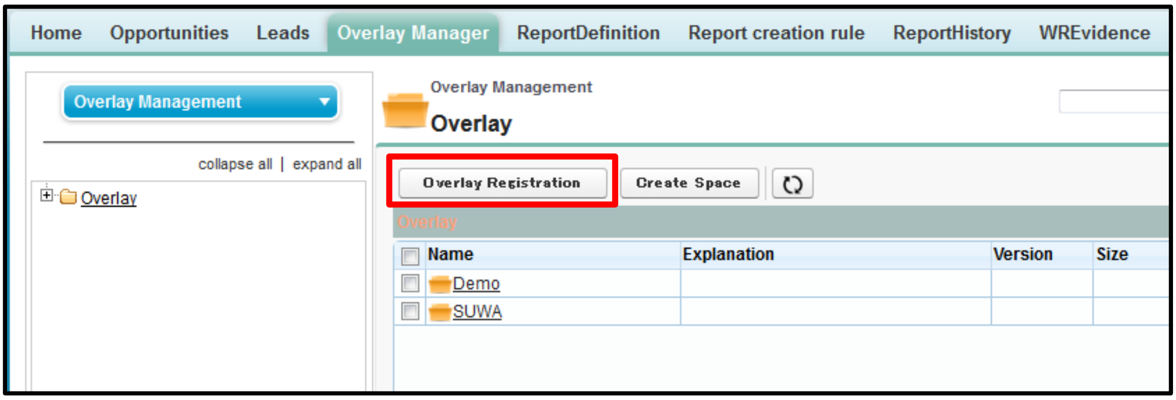


After placing the “Create Report” button, click the “Save” button to save.

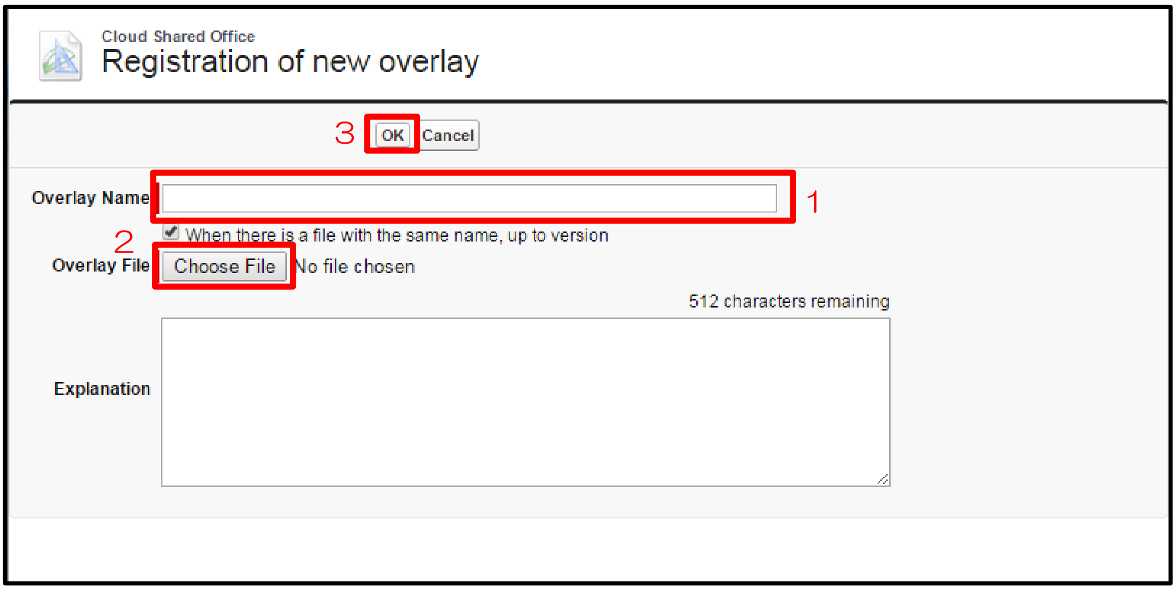
2.4 Register Overlay

After creating an overlay, register it to your CSO WebReport for Salesforce.

Click on the “Overlay Manager” tab, and click the “Overlay Registration” button.

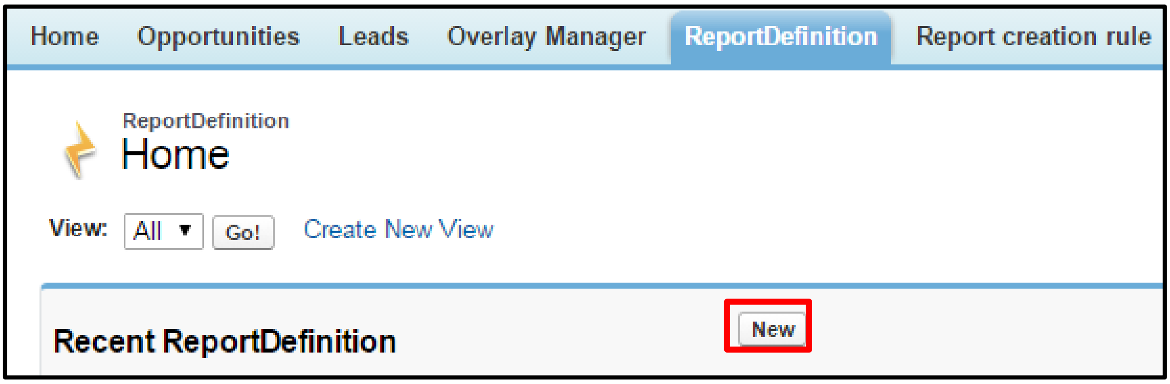


After entering an “Overlay Name”, click the “Choose File” button to select a created overlay, then click the “OK” button to register.

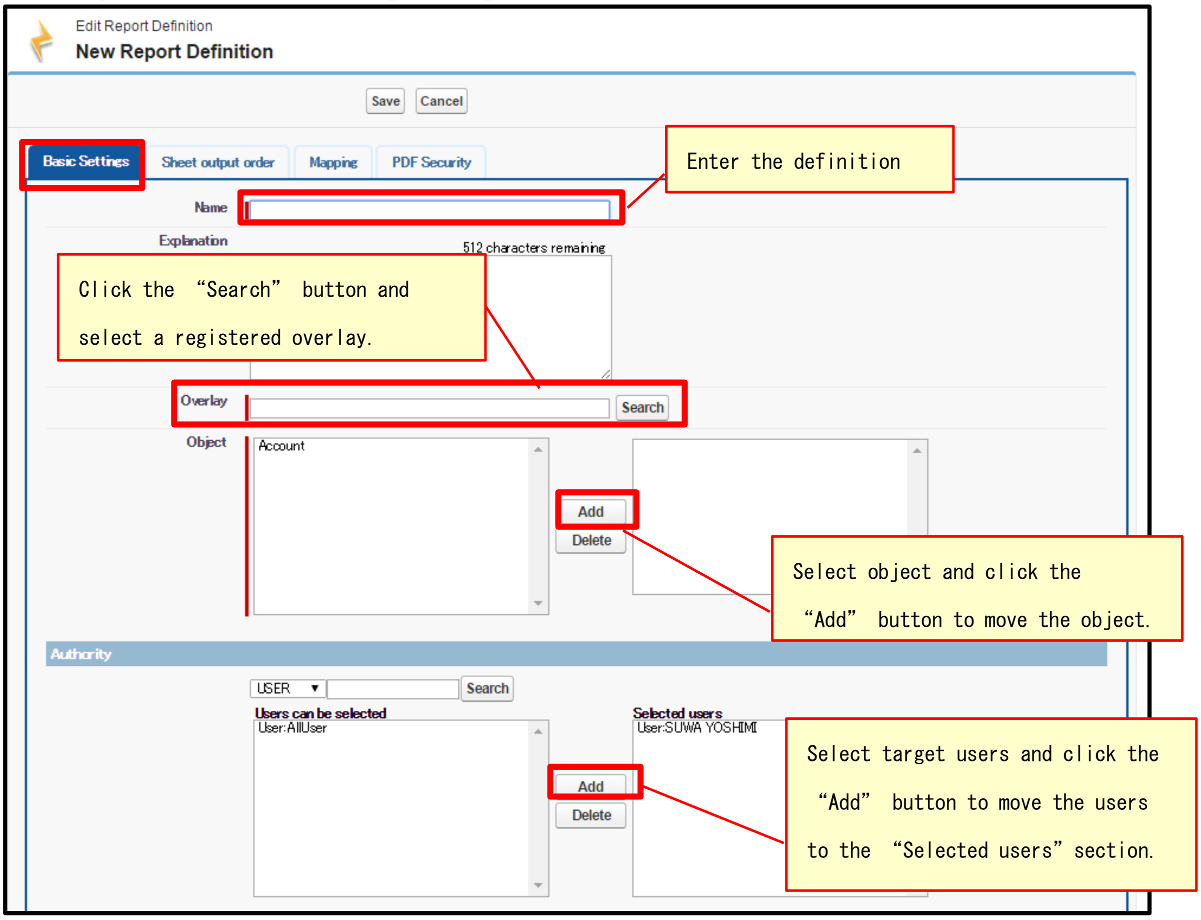


2.5　Register Report Definitions

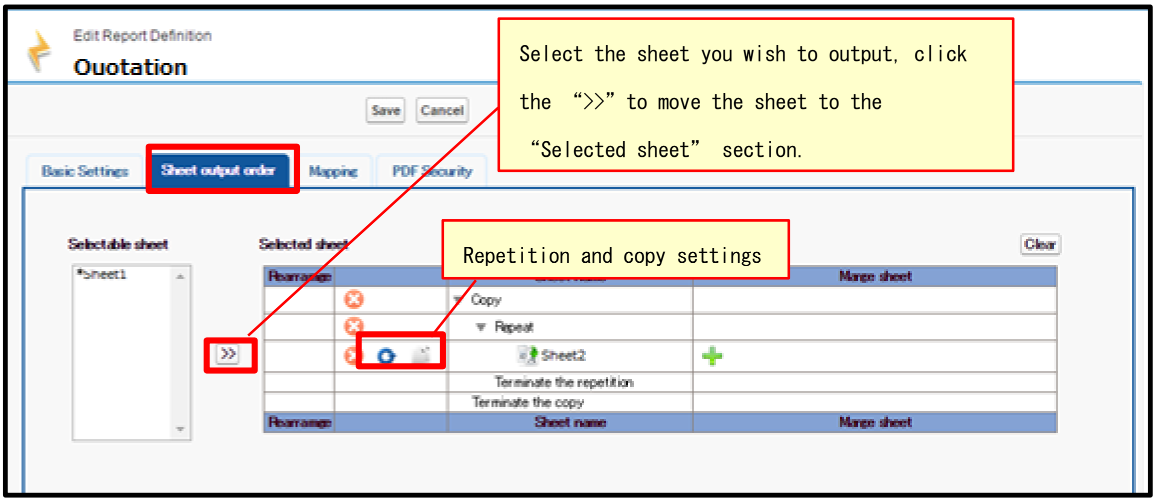
Click “ReportDefinition” on the tab, and click the “New” button.



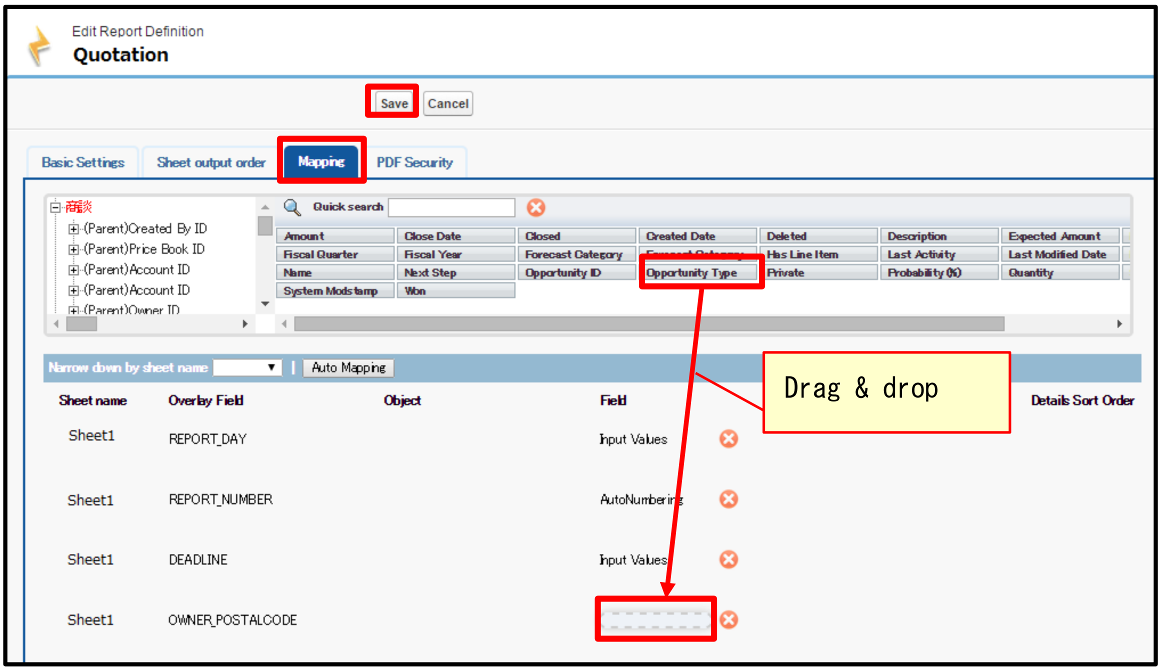
① Under “Basic Settings”, enter the definition name, select a registered overlay, select an output object, and select the target users.



② Under “Sheet output order”, you can configure the output order of sheets, whether to allow copying, and whether to allow repetition.



③ Under “Mapping”, drag & drop the Salesforce’s items that you wish to insert.

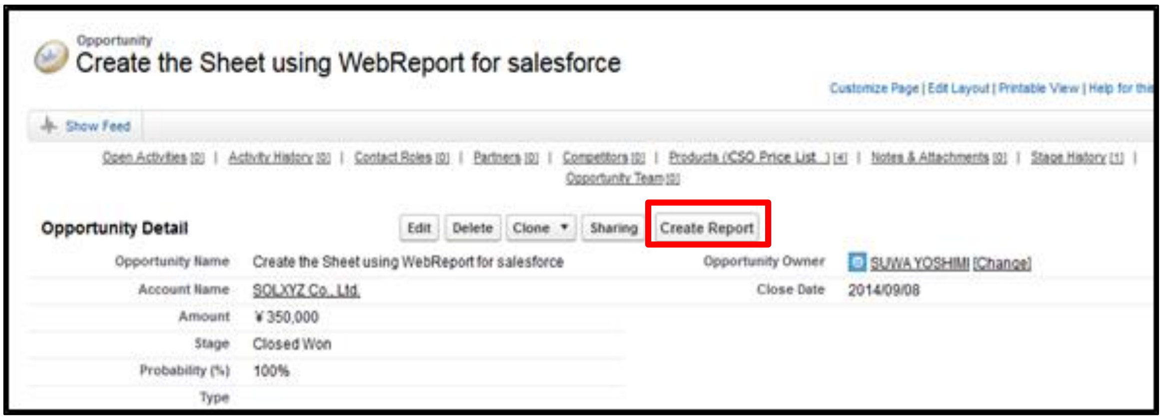


After configuring the report definition, click the “Save” button to register.

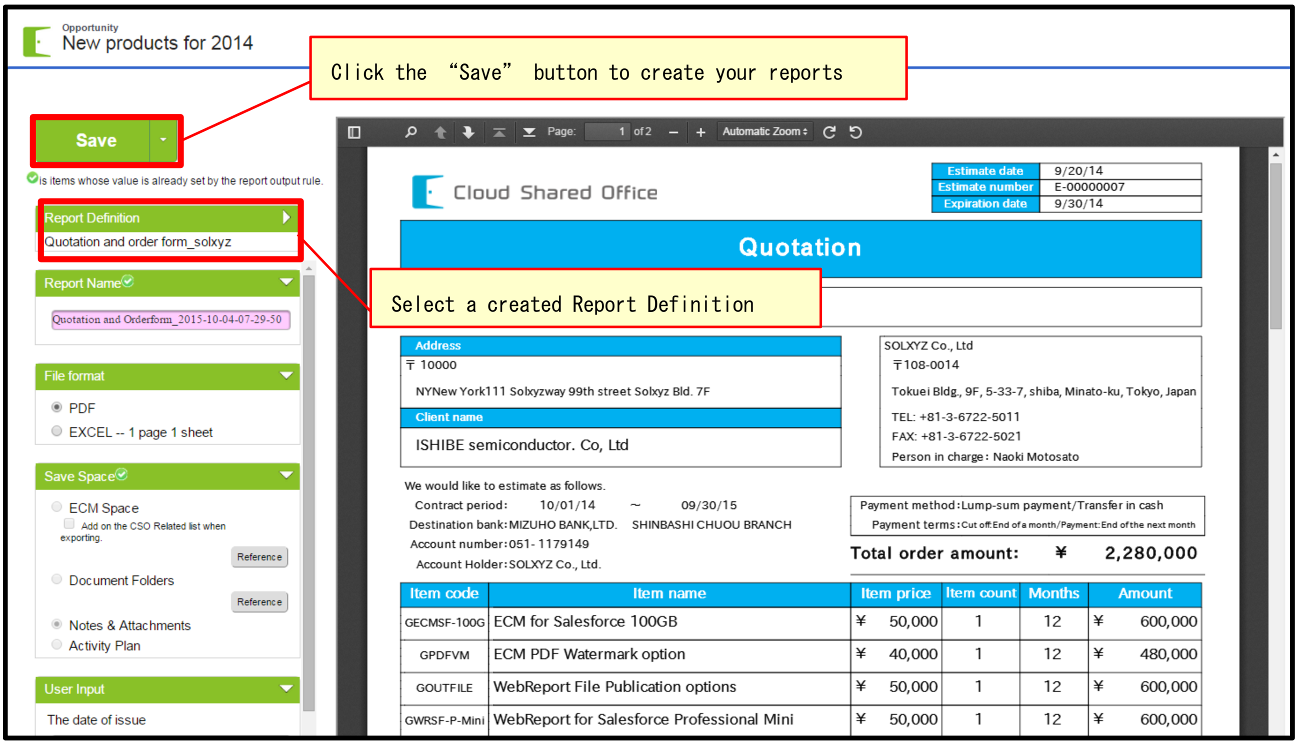
2.6　Report Creation

After registering overlays and report definitions, now let’s try to create a report.

Go to your targeted object, select your targeted record, and click the “Create Report” button.



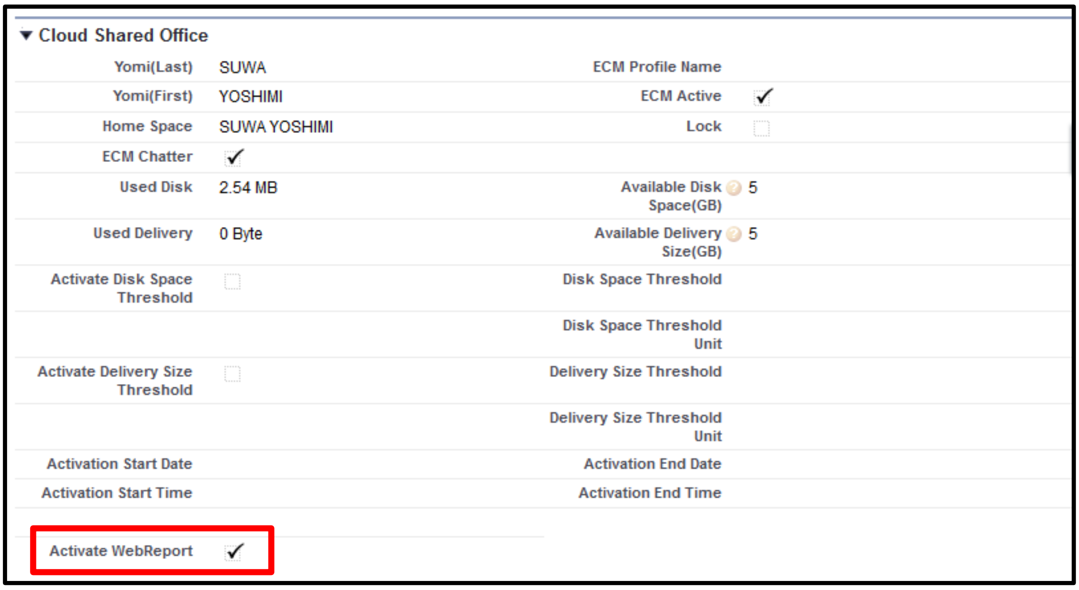
Select a report definition and a save directory, then click the “Save” button to create.



2.7 Enable WebReport for Users ~How to enable WebReport for each individual~

Enable WebReport for users using CSO WebReport for Salesforce. In this section, steps for enabling WebReport for each individual are introduced.

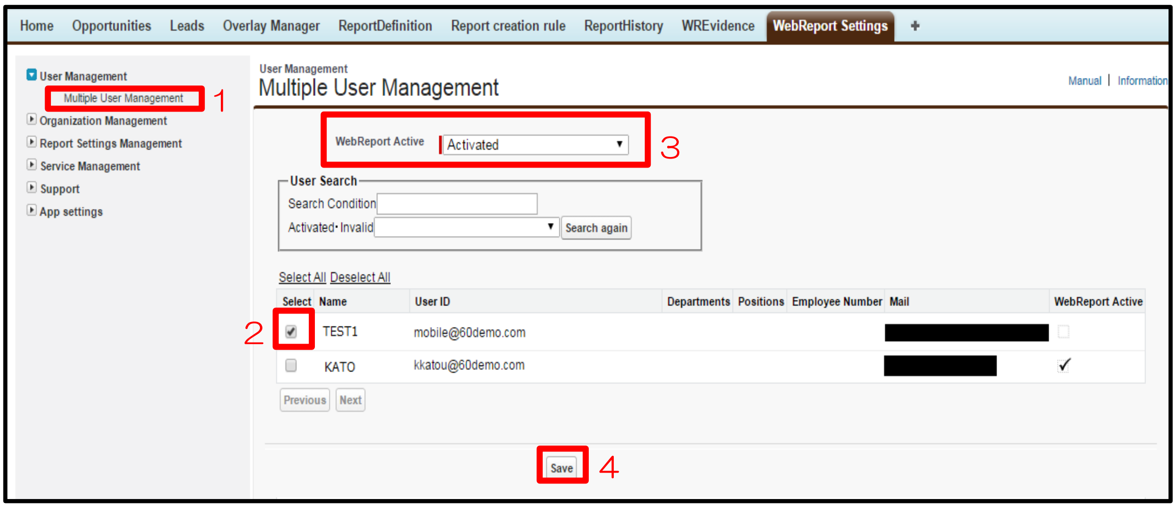
Go to Salesforce Settings >> Manage Users >> Users, select a specific user to go to the corresponding User Detail page, check the box beside "Activate WebReport" in Cloud Shared Office items, and click the "Save" button.



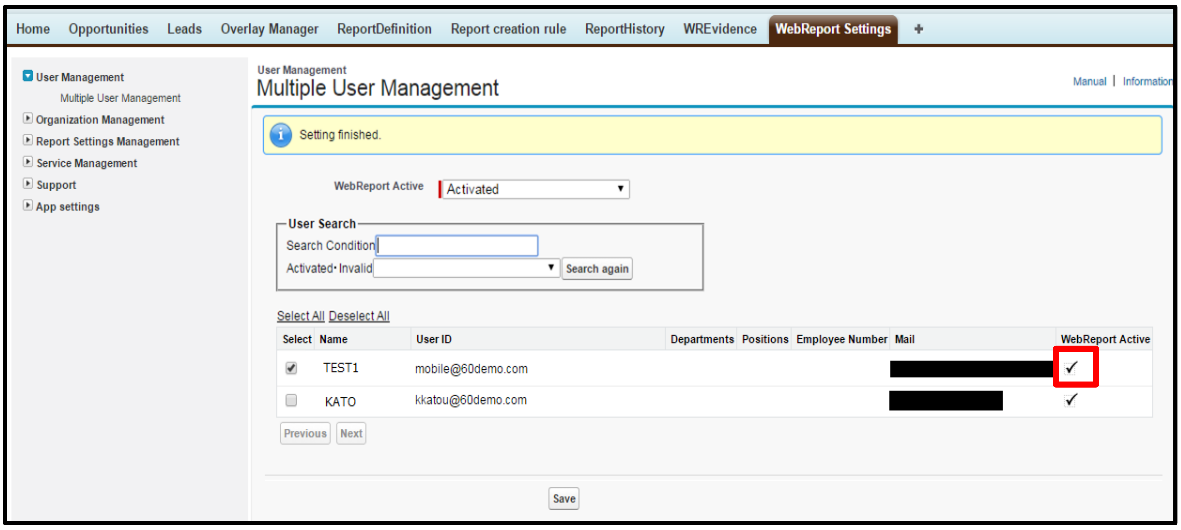
2.8 Enable WebReport for Users ~How to batch enable WebReport for multiple users~

Enable WebReport for users using CSO WebReport for Salesforce. In this section, steps for batch enabling WebReport for multiple users are introduced.

Go to WebReport Settings >> User Management >> Multiple User Management, check the users that you wish to enable WebReport for, then select "Activated" from the drop-down list beside "WebReport Active", and click the "Save" button.



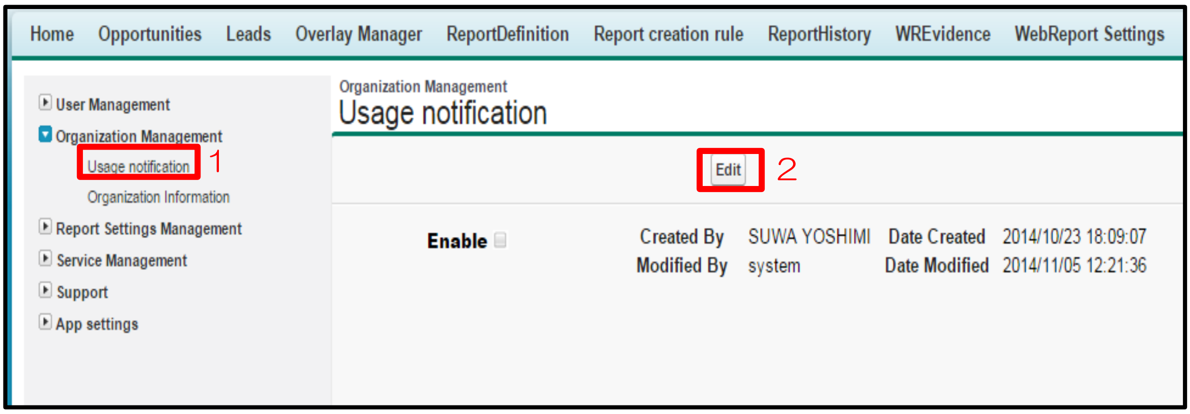
Confirm that WebReport has been activated by checking if the boxes under "WebReport Active" is checked.



2.9 Usage Notification

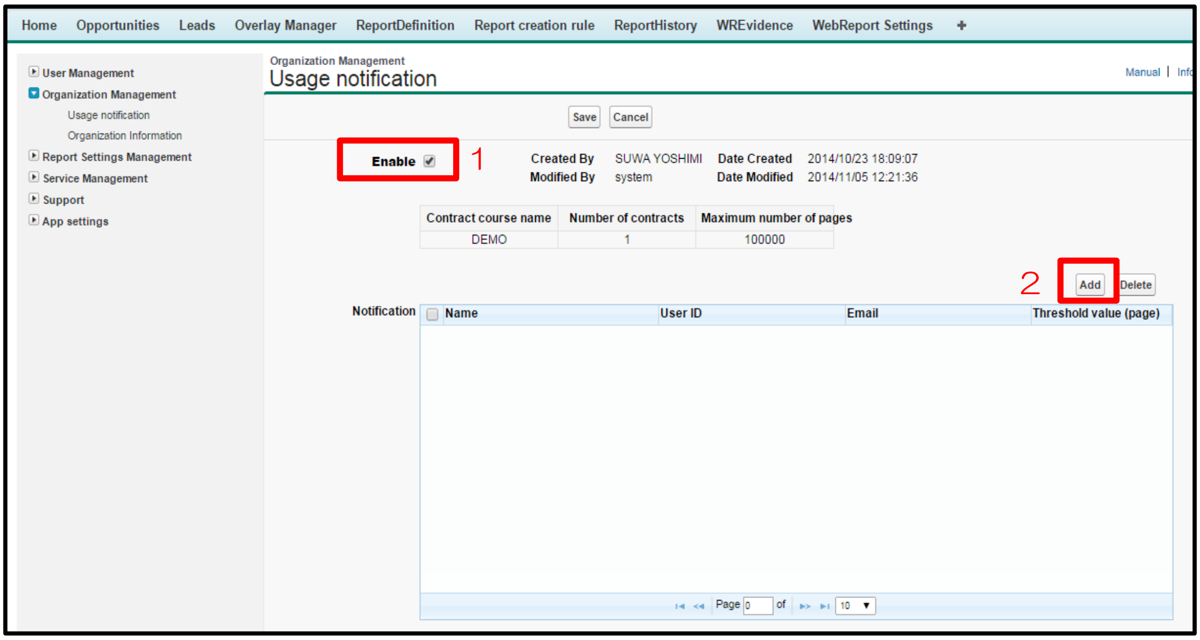
By setting a threshold to your organization's output page number, notification e-mails can be sent to administrators when the threshold is reached.

Go to WebReport Settings >> Organization Management >> Usage Notification, and click the "Edit" button.

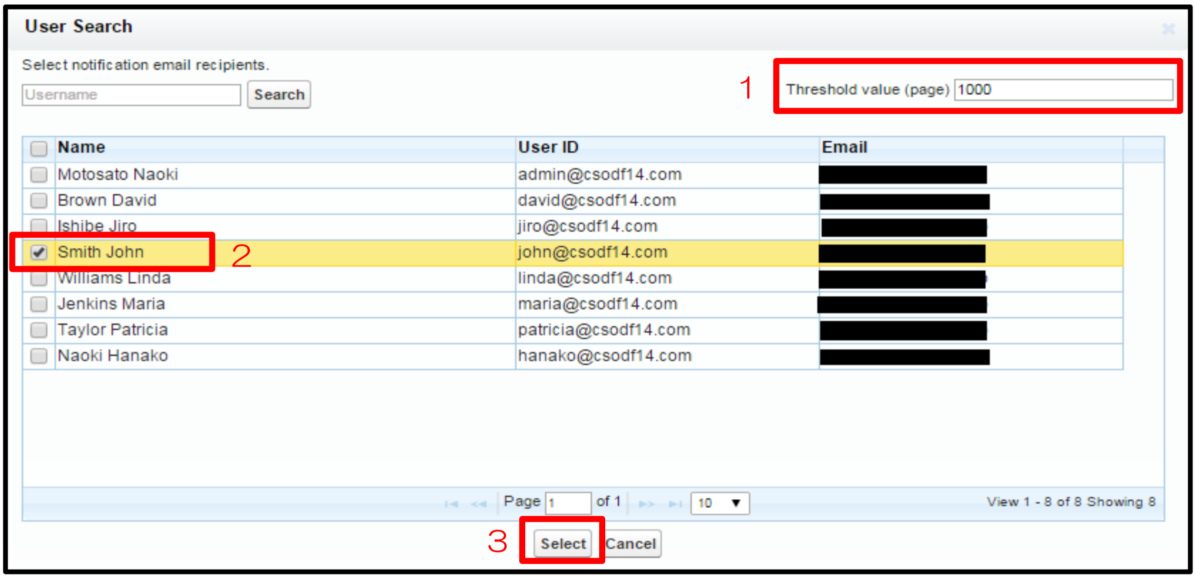


Check the box beside “Enable”.

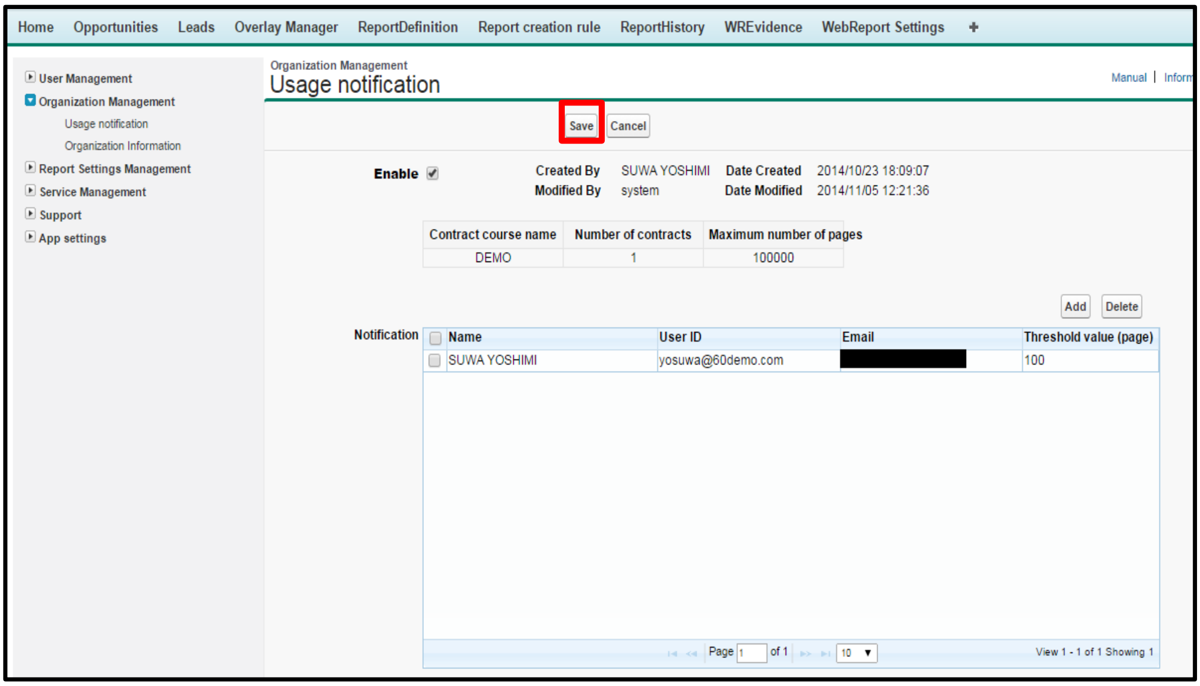
Click the “Add” button to add users for notification.



Enter a Threshold (page number), select the user to notify and click the “Select” button.



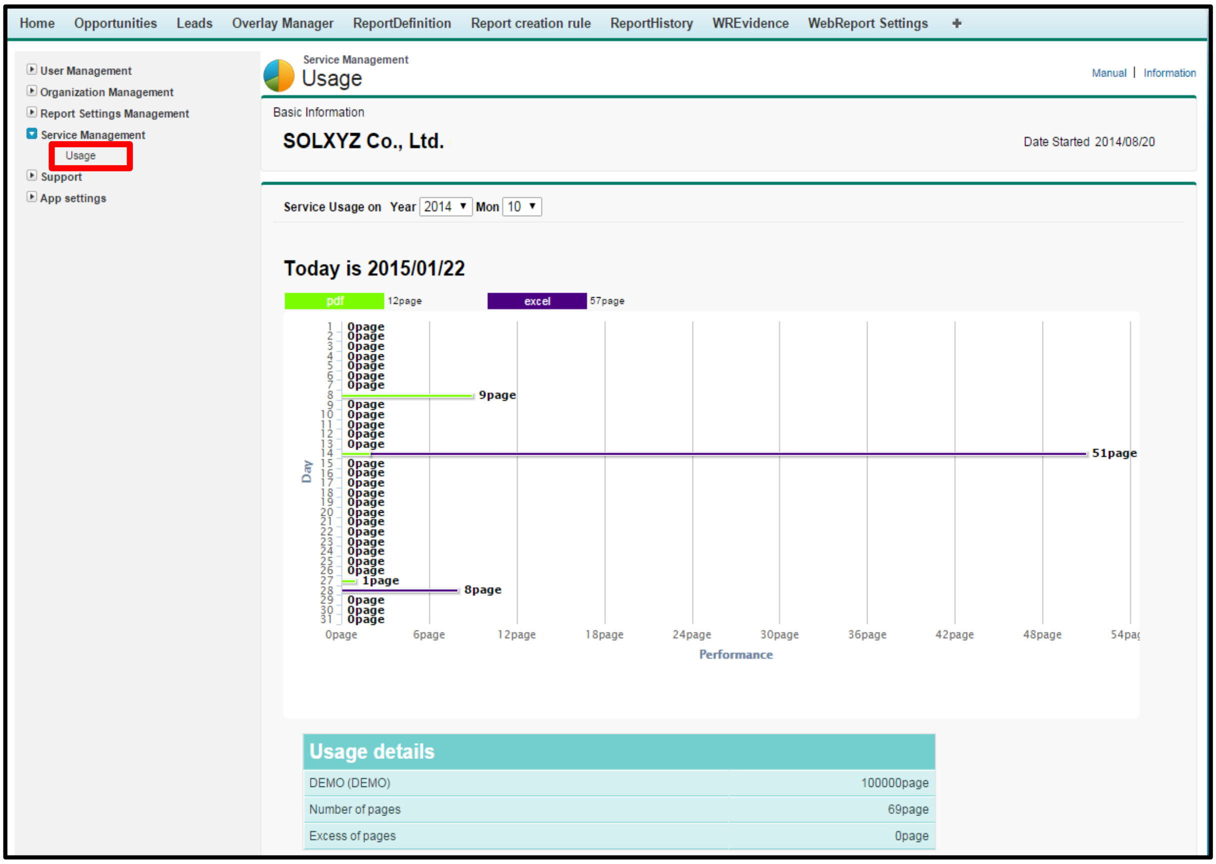
Click the “Save” button to register.



2.10 Check Usage Status

You may check your monthly used page number in CSO WebReport for Salesforce. Administrators may also check the contracted page number and whether this number has been exceeded.

Go to WebReport Settings >> Service Management >> Usage



3　In the End

Up to this point is the basic setup for enterprises to use CSO WebReport for Salesforce. For detailed instructions on creating overlay, a report design guide will be released soon.

Revision History

Revision Date	Version	Contents of Revision	Reason for Revision	Reviser
2015/10/5	1.0	Newly created	Newly created Created the Simple Setup Guide for Cloud Shared Office WebReport for Salesforce	Suwa